



The Financial Planning Association of Minnesota (FPA of MN) is a nonprofit professional association consisting of more than 830 financial planners who specialize in a wide variety of financial disciplines. It is an affiliate of the Financial Planning Association (FPA), the largest membership organization for financial planners in the United States. Formed in 2000, the FPA of MN has been recognized as one of the five strongest FPA chapters in the country.

### **What we do**

The FPA of MN is a united voice for Certified Financial Planners and others who support the financial planning process. It works with academic leaders, legislative and regulatory bodies, financial services firms, and consumer interest organizations to advance the interests of the financial planning industry. FPA of MN members adhere to the highest standards of professional competence, ethical conduct, and practice complete disclosure to those they serve. The FPA of MN is active in the community, specifically when it comes to increasing financial literacy and helping people making financial decisions to achieve their goals and dreams.

### **Active membership**

- The FPA of MN membership is known for being one of the most active groups in the nation.
  - Annual symposium event attracts more than 500 members.
  - Monthly chapter meetings typically draw 150-300 people.
- Members of the FPA of MN are experts in retirement planning, college planning, insurance, long-term care, corporate savings plans, and many other aspects of the financial and retirement planning professions.
- 68% of members are certified financial planners.
- The FPA of MN's board of directors is comprised of 15 people.
- The FPA of MN has 12 committees.
  - Committees include: executive, career development, financial education, member services (retention), membership (recruitment), NexGen, partnerships, pro bono, professional issues, programs, public relations, and symposium.
- The FPA of MN offers more than 30 continuing education credits per year to its members.

### **Community partnerships**

The FPA of MN partners with several community organizations, including:

- **Best Prep**: Through its partnership with Best Prep, FPA of MN members give presentations in local classrooms aimed at giving students the tools necessary to develop sound money management skills.
- **Junior Achievement**: FPA of MN works with nonprofit Junior Achievement to deliver education programs to students on financial planning and career exploration.

### **Financial Planning Day**

The FPA of MN's signature public event is Financial Planning Day, which takes place each October in Saint Paul. At the event, FPA of MN members give free financial advice – to anyone who attends – about a wide range of topics, including budgeting, debt relief, taxes, mortgages, college savings, estate planning, and insurance. Attendance has doubled in each of the event's first four years.