

Membership Segments Effective as of June 1, 2008

5/29/08 12:57 PM

Member	Membership Dues	Descriptor	Benefits	Chapter Reimbursement	Notes on Chapter Reimbursement
Financial Planner	\$395	I am a CFP® professional or an individual who is in the practice of financial planning as my primary vocation. Note: Only qualified CFP® certificants will be listed in PlannerSearch.	My membership includes networking opportunities (live and online), local chapter affiliation, leadership development and volunteer opportunities, consumer connections, media referrals, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> (including access to searchable archives). It also includes the opportunity to earn 12 hours of CE through the <i>Journal of Financial Planning</i> and an additional six hours of CE through FPA-selected Virtual Learning Center archived webinars.	\$75	New chapter reimbursement amount
Candidate for CFP® Certification	\$175	I am a candidate for CFP® certification who has passed the CFP Board Certification Examination and I am working on my experience requirement. Only available for up to three years or until CFP® certification is attained. Note: Not available for PlannerSearch.	My membership includes networking opportunities (live and online), local chapter affiliation, leadership development and volunteer opportunities, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> (including access to searchable archives). It also includes the opportunity to earn 12 hours of CE through the <i>Journal of Financial Planning</i> and an additional six hours of CE through FPA-selected Virtual Learning Center archived webinars.	\$25	New category
1st Year CFP® Certificant	\$195	I am in my first year of CFP® certification. Only available for one year. Note: Only qualified CFP® certificants will be listed in PlannerSearch.	My membership includes networking opportunities (live and online), local chapter affiliation, leadership development and volunteer opportunities, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> (including access to searchable archives). It also includes the opportunity to earn 12 hours of CE through the <i>Journal of Financial Planning</i> and an additional six hours of CE through FPA-selected Virtual Learning Center archived webinars.	\$35	New category
2nd Year CFP® Certificant	\$295	I am in my second year of CFP® certification. Only available for one year. Note: Only qualified CFP® certificants will be listed in PlannerSearch.	My membership includes networking opportunities (live and online), local chapter affiliation, leadership development and volunteer opportunities, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> (including access to searchable archives). It also includes the opportunity to earn 12 hours of CE through the <i>Journal of Financial Planning</i> and an additional six hours of CE through FPA-selected Virtual Learning Center archived webinars.	\$50	New category, same as associated professional
Associated Professional	\$295	I am a professional who supports the financial planning profession or participates in the financial services industry. I am not a CFP® certificant, nor do I practice as a financial planner. I am an estate planning attorney, CPA, registered representative, business consultant/coach, mortgage professional or other executive.	My membership includes networking options (live and on-line), local chapter affiliation, leadership development, volunteer opportunities, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> (including access to searchable archives).	\$50	Same as before
Paraplanner, office manager, support staff	\$195	I am an employee of a firm and I support the financial planning process. I am not a CFP® certificant.	My membership includes networking options (live and online), local chapter affiliation, leadership development and volunteer opportunities, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> .	\$35	New category
Retired financial planner	\$145	I am a retired financial planner, which was my primary vocation.	My membership includes networking options (live and on-line), leadership development, volunteer opportunities, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> . It also includes the opportunity to earn 12 hours of CE through the <i>Journal of Financial Planning</i> and an additional six hours of CE through FPA-selected Virtual Learning Center archived webinars to maintain CFP certification.	\$15	Same as before
Educator	\$145	I am an academic who spends the majority of my time teaching financial planning, finance or business at an educational institution.	My membership includes networking opportunities (live and online), local chapter affiliation, leadership development and volunteer opportunities, media referrals, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> (including access to searchable archives).	\$15	Same as before
	\$225	Educator + CE Package: I am an academic who spends the majority of my time teaching financial planning or business at an educational institution and would like the education "bundle" of products.	My membership includes networking opportunities (live and online), local chapter affiliation, leadership development and volunteer opportunities, media referrals, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> (including access to searchable archives). It also includes the opportunity to earn 12 hours of CE through the <i>Journal of Financial Planning</i> and an additional six hours of CE through FPA-selected Virtual Learning Center archived webinars.	\$15	Same as before
Student (in certificate program)	\$145	I am a student in a CFP certificate program.	My membership includes networking options (live and online), local chapter affiliation, leadership development and volunteer opportunities, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> (including searchable archives).	\$15	New category but left same as educator
Student (in degree program)	\$35	I am enrolled in a CFP® registered degree program or related finance/business degree program.	My membership includes networking options (live and online), local chapter affiliation, leadership development and volunteer opportunities, a membership directory listing, access to Coach Match and the FPA Career Center, <i>Solutions</i> magazine, <i>Research Spotlight</i> and the <i>Journal of Financial Planning</i> (including searchable archives.)	\$15	Same as before