



What is the Society of Financial Service Professionals?

- Premier association in the industry—**thought leaders and industry experts** belong to FSP
- A **distinctive** community of multidisciplinary professionals—you can build a strong team of advisors to help serve clients better
- World-class resources in your own back yard—**local and national networking and education opportunities**

Who are the members of FSP?

- Experienced, accomplished financial advisors, attorneys, CPAs, insurance experts, and other professionals—immediate opportunities for collaboration and referrals

Why belong to FSP when other associations charge less but offer networking and educational opportunities, too?

- Networking with peers (of the same designation or discipline) doesn't offer the same opportunities for referrals as does a multidisciplinary community like FSP
- Broader range of educational offerings enhances your own expertise and fosters the exchange of ideas from different perspectives
- Special membership rates apply to those meeting the criteria for Young Professionals (age 40 and under): they pay only 50% of the cost of national membership in FSP
- Member Advantage Partner Program saves you money on goods and services, improving your practice's bottom line

What benefits does FSP offer members?

- Access to relationships across multiple disciplines
- Dynamic educational opportunities with industry experts, both locally and nationally
- Authoritative publications, including the *Journal of Financial Service Professionals*
- Timely resources and knowledge to grow practices and fuel the highest level of client service
- Opportunities to gain leadership experience at local and national levels

- Members-only discounts on E&O, long-term disability, long-term care and cybersecurity plans that provide substantial savings
- Free year of JourneyGuide retirement planning software
- Discounts on programs from SurgentCPE and ALI-CLE

What is the real value of membership in FSP for me?

- Build your network—create a multidisciplinary team of experts to better serve your clients
- Build your expertise—gain free access to high-quality, in-depth education across subject areas
- Build your practice—get referrals you wouldn't otherwise get in an organization focused on one specialty

We welcome as regular members qualified professionals who hold one of the following credentials:

AEP®, CASL®, CEBS®, CFA, CFP®, ChFC®, CIMA, CLF®, CLU®, CPA, CPCU®, CTFA®, Enrolled Actuary, JD, MBA, MSFS, MSM, Masters/PhD in Financial Services, REBC®, RHU®, RICP®.

Associate Membership: a financial service professional recommended by a regular Society of FSP Member AND has any of the following: Five years of experience OR pursuing one of our eligible designations/graduate degrees OR holds a Series 6, 7, 63, 65 or 66 license.

To learn more about belonging DALLAS CHAPTER OF FSP

Contact: Pat Pattison, Chapter Executive

Email: DallasFSP@flash.net

Phone: 972-200-7389

Website: www.societyoffsp.org/dallas

