



FINANCIAL
PLANNING
ASSOCIATION

ORANGE COUNTY

February 2021 Quarterly Education Meeting Event Resources

[FPA of Orange County Website](#)

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Help Spread The Word - [FPAOC Pro Bono's Essentials of Financial Planning Webinar Series](#)

Thanks for participating in our Quarterly Educational Event! Below are resources if you would like to get in touch with our partners.

Attached to this email is also the Menti presentation from our presenter, Melissa Kemp. You can review this at any time.

As a reminder, if you are a FPA member you can get \$200 off the CFP Exam just by calling the CFP Board before you register. FPAOC also awards three \$200 scholarships to deserving chapter members each year. For more information, reach out to membership@fpaoc.org for more information.

FPA also puts on quarterly virtual media training for all members. This is a great way to become an expert for journalists looking to speak on the record about financial planning. For more information, visit: www.financialplanningassociation.org/lead/media-training.

Our next Quarterly Education Meeting will take place on May 19.

THANK YOU TO OUR PARTNERS for bringing trusted business solutions to our Forum. They are here to help your business!

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<https://www.cnlstrategiccapital.com/overview/overview-video.shtml>

[SCAPI - Fact Card Combo Shares - Public - 8_20](#)

[SCAPI - Market Opportunity - Public- BD](#)

[SCAPI - SCAPI Conversation - Public - BD](#)



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[PCN Annuity Review: Review. Revise. Realize!](#)



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[Asset Allocation Model Review Program Guide](#)

[Five Reasons Why Investors Should Now Consider Small-Caps_US](#)

[TRP AA Viewpoints 30Sep20_US](#)

[TRP Active ETF Process \(5\)](#)

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[09 2020 Investment Insight for Financial Professionals General Institutional](#)



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[Recoveries have rewarded patience](#)

[Understanding market downturns](#)



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[3Q20 Firm Summary](#)

[3Q20 Fixed Income Insights](#)

[3Q20 Core Fund Commentary](#)

[3Q20 Short Duration Fact Sheet](#)

[3Q20 Core Plus Fact Sheet](#)

[3Q20 Short Fund Commentary](#)

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[Information for Financial Advisors and CPAs](#)

[Webinar: Home Equity Solutions for Mass Affluent Retirees](#)



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[Cantor Fitzgerald Income Trust Invitation](#)

[CF Income Trust Fact Sheet](#)



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[Harbor Funds Overview - Institutional - 09.23.20](#)

[Presentation - 3Q20 Asset Allocation Viewpoints - Sept 2020](#)



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[Innovation Growth Update \(9/30\)](#)

[Bond Debenture Update \(8/31\)](#)

[Municipal Bond Update \(8/31\)](#)



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