

# Welcome to the ACP Community!

## Our Community

Many ACP advisors became members for the training as ACP teaches you how to deliver holistic financial planning. Our advisors are best in class. After learning and implementing the training into their practice ACP members stay for the community. A big part of your annual dues are giving you access to the ACP Brain Trust. Take advantage of this community to ensure you are giving your clients the best advice and running an efficient and profitable business.

Over the years the members who utilize the ACP Brain Trust and are active members in our community tend to flourish in their practice. It's not by chance. You are networking with the brightest minds in the industry. Take advantage of this resource.

Here are some ways to tap into and become part of the ACP Community.

## Conferences/Retreats

- **Annual Conference** – In-person event held each Fall. Many sessions are led by fellow ACP members. Plenty of time for “hallway conversations” and networking. Many study groups are formed from meeting like-minded members at the conference. This is a must do.
- **Solo Advisor Retreat** – Virtual event held each January. Learn how solo advisors within ACP are running profitable and efficient practices.
- **Advanced Planner Retreat** – In-person event held each spring after tax season. Learn how other multi-advisor firms are running ensemble firms.

## Study Groups/Practive Management Groups

Many advisors join small groups that meet periodically throughout the year. These groups tend to form organically from meeting like-minded members while attending conferences, serving on a committee, viewing responses on the ACP Discussion forum, etc.

## ACP Connect

**Discussion Forum** – Tap into the Brain Trust by posting questions. That's what the membership is here for – to help you along, whether it is a financial planning or a practice management query.

**QuickLinks** – On the right side of ACPConnect you will find access to ACP's Core Tools (ACP Pyramid and ACP Toolkit). Other resources include the ACP Practice Life Cycle Matrix where you can benchmark your practice.

## Calls & Committees

To follow are periodic calls open to all ACP Members.

- **Investment Discussion Group** –for ACP Members Interested in collaborating on investment-related topics. Bring your questions. This is a group you can join in ACP-Connect.
- **New Advisor Best Practices** - Quarterly calls led by long-term members Troy Thompson and Elizabeth Buffardi. Meeting times are communicated in Announcements emails, and posted in Events/Upcoming Webinars.
- **New Member Connection Calls** - Come as you are social get-together for “newish” members. Each call will be hosted by two members of the New Member Integration Committee. Meeting times are communicated in Announcements emails, and posted in Events/Upcoming Webinars.
- **Modern Advisor Marketing** – Hosted by industry PR/Marketing guru Marie Swift. Various topics to help you market your practice. Meeting times are communicated in Announcements emails, and posted in Events/Upcoming Webinars.
- **Reading More > Book Club** – Informal reading group for anyone interested in participating. The meeting cadence is every other month, covering a medley of 6 books in a year. This is a group you can join in ACP-Connect for dates, times, and the title of the next book.

## ACP Committees

Our organization is member led. We need your talents to help improve our organization and to move it forward. Many of the innovations within ACP way come from ideas generated and implemented at the committee level. This is another way to connect with your fellow ACP members. Please reach out to the **ACP Team at [acp@acplanners.org](mailto:acp@acplanners.org)**, for an outline of the organization’s committees to see where you fit in.

## Other Resources

Here are some books other ACP Members have utilized to move their practice along:

- **Get Clients Now** – Marketing strategies for those who provide professional services. Set up a group of other ACP planners to work through this program together to share stories and keep each other accountable.
- **e-Myth Revisited** – Advice to set up procedures and organize your business to keep it efficient.
- **The Ensemble Practice** – Building a team-based approach for your financial planning practice.

**The more connected you are with your fellow ACP members the better your practice will run. Please don’t hesitate to contact any member for financial planning or practice management advice. How do you know who to call? Get involved! As an ACP member, you get out of the organization what you put into it!**

