FPA

Call for Speakers

FREQUENTLY ASKED QUESTIONS

Q: What are the steps to create and submit a proposal?
A: **Step One:** Once logged in, under the heading "Proposals" select "Click here to begin a new proposal."

Step Two: Create a proposal title then select a category from the drop down. Once complete, click "Continue." For a description of the categories, click "View proposal category descriptions" under the dropdown menu then click "Submit."

Step Three: Complete the five (5) tasks.

1. **Speakers**
    a. If you are the sole speaker, click your name listed under the heading "Speaker List." If you need to add additional speakers, enter the name in the fields listed above "Speaker List" and below "Add New Speaker", then click "Add Speaker."
    b. Fill out the speaker details sheet. *Note, anything marked with a red asterisk is required.*
    c. Upload a headshot. Image must be larger than 100 kb and a minimum of 240 px wide, 300 px tall, image must also be a jpg or png file.
    d. Provide one speaker reference who can attest to your experience as a speaker.
    e. If you added additional speakers, click on their name to complete the details you just completed for yourself.
    f. Once finished, click "Save Speakers."

2. **Proposal Details**
    a. Supply the following information: Title, Topic and Subtopic, Instruction Level, Presentation Style, Prior CE Approval, Session Description and Summary Outline.
        i. Topic and subtopic options are:
            1. Topic: Practitioner

        a. Subtopics: Financial Planning; Insurance; Investments; Taxes; Retirement; Estate Planning
    2. Topic: Business
        a. Subtopics: Leading a successful practice; Business management; Technology; Business Challenges; Client Communication; Marketing
    3. Topic: Profession
        a. Subtopics: Passing the torch and attracting new planners; Future of the profession
    4. Topic: Other

3. **Learning Objectives**
    a. Provide three learning objectives that are clear, measurable and achievable.

4. **Terms and Conditions**
    a. The Terms and Conditions outline the process and how your information will be used. The document also contains a sample contract similar to the one you may be asked to sign should your submission be selected for FPA Annual Conference 2025. *Note, you are not signing the speaker agreement, you are simply acknowledging that you have read and understand that you will be asked to sign something similar should you be selected as a speaker.*

5. **Presentation Upload**
    a. If you have a PowerPoint you would like to submit, either for the topic you are submitted for or something similar to give additional context to the Task Force, please upload it here. If you do not have a presentation to share, click on the check box labeled "I have no files to upload" to complete the task.

Step Four: Once all five tasks have been completed (noted with a green checkmark next to each task), click on the "Save Submission" button then click "Submit" at the top of the page. You will receive a confirmation email with your submission details.

Q: What is the submission deadline?

A: All proposals must be received by 11:59 PM EST on Friday, May 30, 2025.

Q: After I submit my proposal, can I edit it?
A: Yes, you can edit your proposal up until the Call for Speakers closes on May 23, 2025. Simply log into your account, click on the proposal, and edit the applicable tasks. Once complete, click "Save Submission."

Q: Why won't the form accept my signature in the Terms and Conditions task?
A: You must type in the same name and use the same spelling as the one you listed when you created the account. This detail can be found under 'Personal Details' in the Speakers Task.

Q: What are the dates of the 2025 conference and where will it be held?
A: FPA Annual Conference is scheduled for November 3-5 to be held at the MGM Grand in Las Vegas, Nevada.

Q: How are proposals reviewed?
A: Proposals will be reviewed by the Annual Conference volunteer Task Force and graded based on the following criteria:

1. Quality of the proposal
    a. Is the proposal complete and clearly articulated?
2. Objectivity
    a. No company, product or promotion is being pushed.
3. Relevance
    a. Does it apply to financial planning professionals with basic, intermediate, or advanced learning and development needs?
4. Subject matter
    a. Is the material creative, thought provoking, beneficial and/or applicable to the work financial planners do?