



Financial Planning Association and Protected Tomorrows, Inc. Announce Strategic Alliance

Protected Tomorrows helps FPA® members address growing client base with special needs

DENVER and LINCOLNSHIRE, IL (Jan. 7, 2013) - The Financial Planning Association (FPAnet.org) (FPA®) and Protected Tomorrows (protectedtomorrows.com) today announced a strategic collaboration that will leverage the aspects of both organizations. Protected Tomorrows, an international advocacy firm headquartered in the Chicago area that enhances the lives of people with special needs through a comprehensive life planning process working with families directly and by providing training programs to professionals who work with families with special needs, will bring its expertise and educational resources to FPA members. The members of FPA, the largest membership organization for personal financial experts, will receive a discounted rate for the [Protected Tomorrows Professional Membership Program](#). The offer will be part of FPA's new [Practitioner Resource Guide](#), a robust directory of practical solutions and benefits available to FPA members to help them move their businesses forward.

An estimated 20 percent of Americans have a disability and that number is expected to grow. As people with such special needs as Down syndrome and Alzheimer's disease living longer, and more children are being diagnosed with autism, there's a greater need for financial planners to better understand this unique group. Laws, issues and opportunities are complex and constantly changing for people with special needs. In addition, regulations are cumbersome, so getting services can be difficult. Not everyone knows how the government is willing to help. Protected Tomorrows serves as a partner and referral base for financial professionals.

The Protected Tomorrows Professional Member Program helps professionals manage business risks, assist in practice growth and deepen relationships with clients with special needs by way of the following:

- Virtual learning series on serving families with special needs
- Ongoing continuing education (via live Webinars and archived webcasts)
- Educational programs (via conferences and regional conferences)
- Access to reference library, resources and tools
- Direct knowledge sharing with Protected Tomorrows professionals

"More financial planners are in need of specific training to meet the growing concerns of their clients with special needs," said FPA's Executive Director and CEO Lauren M. Schadle, CAE. "We're pleased Protected Tomorrows is bringing its unique knowledge of this important client segment to further enhance the expertise of our members."

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“We’re excited to be assisting FPA members who not only want to do right by their clients, but also don’t realize the business risk they are shouldering by not fully understanding the latest laws in planning for people with special needs,” said Mary Anne Ehlert, CFP[®], president and founder of Protected Tomorrows, who has specialized in special needs planning for more than 20 years. “Our program gives financial planners the knowledge they need to work with these families, enabling them to navigate challenging conversations, recognize key technical information and connect clients to the proper resources.”

FPA will host a live webinar featuring Ms. Ehlert focused on how to avoid the risks many planners face in working with clients who have a loved one with special needs – whether they know it or not. Participants will earn one hour of CFP[®] CE credit through this introductory online training session: “The Good, the Bad and the Ugly: Advisors with Good Intentions Reversing Bad Outcomes and Ugly Consequences.” Three webinars will be offered: 1:00 – 2:00 PM EST on Jan. 22, Feb. 27 and Mar. 26. The webinar is free of charge for FPA members. For more details and registration information, individuals can visit fpanet.inreachce.com/.

About The Financial Planning Association (FPA[®])

The Financial Planning Association (FPA[®]) is the largest membership organization for personal financial planning experts in the U.S. and includes professionals from all backgrounds and business models. FPA members adhere to the highest standards of professional competence, ethical conduct and clear, complete disclosure to those they serve. Based in Denver, Colo., FPA works in alliance with academic leaders, legislative and regulatory bodies, financial services firms and consumer interest organizations. For more information about FPA, visit www.FPAnet.org or call 800.322.4237.

About Protected Tomorrows

Protected Tomorrows, Inc., headquartered in the Chicago suburb of Lincolnshire, is the leader in enhancing the lives of families with members who have special needs. By guiding families through its comprehensive, proprietary planning process, Protected Tomorrows helps families plan a safe and fulfilling life for a loved one by creating a Future Care Plan[™]. Through their work with clients and the family’s advisors, and alongside of other advocates and legislators, Protected Tomorrows addresses many concerns of families with special needs such as: future care funding, government benefits, legal considerations, residential options, employment opportunities, recreational choices, education options and family communication. For questions, contact us at info@protectedtomorrows.com or call 847.522-8086. For more information, visit www.protectedtomorrows.com.

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