

Community Support

Your Personal & Professional Growth Network



Welcome to the XYPN Community! Whether you're just starting or running an established firm, you understand the value of connecting with like-minded professionals. Can you imagine the impact a whole Network of peers working together for your gain and growth will have on you and your firm?

This guide is designed to help you explore and leverage the various benefits and resources available to you within XYPN membership and your network of peers. From engaging mastermind groups and exclusive forums to virtual networking and local meet-ups, our community offers a wealth of opportunities to support your personal and professional growth.



NO. 1

Mastermind Groups

Experience the ongoing impact of collective wisdom in small group settings matched by niche, interest, firm stage or other focus.

Launch Groups are designed to offer support and seamless integration to new members just starting their RIA, setting you up for success from the start. Once your Launch Group experience concludes, you'll find many other community resources and groups to continue your engagement.

Find Your Fit: Discover how to join a mastermind group after your initial launch. Use your portal and the "Find Your Fit" form to explore different mastermind options tailored to your needs.

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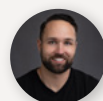
Resource Access

Unlock the full potential of your XYPN Community by utilizing our robust resource tools.

Portal Navigation: Easily locate resources and groups through your member portal, streamlining your journey to success.

Utilize the Forums and Directory: Leverage both the Forums and the Member Directory to connect with peers and access essential resources, enhancing your professional network.

The community aspects of XYPN help firm owners feel like we're not on an island."



Allen Mueller, CFA, MBA

7 SATURDAYS FINANCIAL

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Networking Opportunities

Expand your professional network through a variety of dynamic networking opportunities.

Virtual Networking: Join Office Hours and other virtual events posted in Member Forums and on the Member Calendar to connect with experts and peers providing insights and solutions on a broad range of topics. You can also join [virtual events](#) offered to non-members.

XYPN LIVE: Enjoy finding and connecting with your people where the Network comes together at XYPN LIVE. Learn how to level up on all areas of firm ownership, growth and well-being with industry experts and XYPN members excited to share, inspire and get inspired! (P.S. XYPN Members get discounted passes.)

Meet-Ups: Engage with your peers through local events and social gatherings, building deeper connections in your area. Stay connected by checking out the [Industry Events](#) page to find any upcoming events in your area.

I love being a part of a community of financial planners changing the industry! I've realized a lot of value in collaborating with others in XYPN to share ideas, templates, and best practices."



Katie Brewer, CFP®

[YOUR RICHEST LIFE PLANNING](#)

NO. 4

Community Culture

Immerse yourself in the vibrant culture of the XYPN Community, where a supportive network and a commitment to diversity, equity, and inclusion are at the heart of everything we do.

Support Network: Find your fit in a [community of approximately 2,000 advisors](#) where collaboration is key to everyone's success. As Pam Horack, CFP®, from our [intro video](#) puts it, "A win for the network is a win for everyone."

Diversity, Equity, and Inclusion: XYPN is committed to fostering an inclusive environment where every advisor feels valued and supported.

Part of the Community

Being part of the XYPN Community offers unparalleled value. We encourage you to explore these resources and actively participate to harness the full potential of your membership. Together, let's propel your professional growth to new heights.