



FINANCIAL
PLANNING
ASSOCIATION

2020 Press Kit

Change Tomorrows™





About FPA

The Financial Planning Association® (FPA®) is the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals, educators, financial services professionals and students who are committed to elevating the profession that transforms lives through the power of financial planning. With a focus on the practice, business and profession of financial planning, FPA advances financial planning practitioners through every phase of their careers, from novice to master to leader of the profession.

**To elevate the profession that
transforms lives through the
power of financial planning.**



About FPA

Since 2000, the knowledge and support that FPA provides has helped shape the futures of countless members.

FPA has inspired our members to take that next step and find a path forward so they can realize their full potential.

We accomplish this by providing four key benefits to our members:

Inspiration: Timely ideas, unique perspectives and forward-looking points-of-view that have value.

Growth: Knowledge, guidance, and mentorship that helps members—and the profession as a whole—continually advance and improve so we can meet the changing needs of our clients and better serve them.

Amplification: A unified voice that represents our shared values, vision, and collective interests on the stages and forums that matter most to raise awareness and bring the benefits of financial planning to more people.

Belonging: A receptive, participatory community where you feel heard, supported, and involved.

Our members apply these benefits to their clients every day. An FPA financial planner can change the trajectory of their clients' lives so they can achieve a better future. It's what gets our planners out of bed in the morning.



Martin Seay, Ph.D., CFP®

2020 FPA President

Dr. Martin Seay, Ph.D., CFP® currently serves as the volunteer president of the board of directors for the Financial Planning Association® (FPA®), the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals, educators, financial services professionals and students who are committed to elevating the profession that transforms lives through the power of financial planning.

Dr. Seay is Department Head and Associate Professor of Personal Financial Planning at Kansas State University, where he oversees and teaches in the CFP Board-registered undergraduate, graduate certificate, master's and Ph.D. programs. His research focuses on borrowing decisions, how psychological characteristics shape financial behavior, and methodology in financial planning research. His work has been published in the *Journal of Financial Planning*, *Journal of Behavioral Finance*, *Journal of Financial Counseling and Planning*, *Financial Services Review*, *Journal of Consumer Affairs*, *Journal of Financial Services Professionals*, *Journal of Family and Economic Issues*, *Journal of Financial Therapy*, among others.

His research has been recognized with the 2014 and 2017 FPA Annual Conference Best Applied Research Paper Award, the 2016 CFP Board's ACCI Financial Planning Award, and the 2016 Montgomery-Warschauer Award, which is awarded by the *Journal of Financial Planning* for the paper that provided the most outstanding contribution to the betterment of the profession in the previous year. Additionally, he was awarded the Kenneth Tremblay Early Career Housing Award from the Housing Education and Research Association in 2016 and the Richard L. D. Morse Early Career Award from the American Council on Consumer Interests in 2018.

Dr. Seay received his Ph.D. in Housing and Consumer Economics with an emphasis in Personal Financial Planning from the University of Georgia and is a director for the Academy of Financial Services. He also currently serves on the editorial review boards for the *Journal of Financial Planning* and the *Journal of Financial Therapy*.



Evelyn M. Zohlen, CFP®

2020 FPA Chair

Evelyn M. Zohlen, CFP® currently serves as volunteer chair of the board of directors for the Financial Planning Association® (FPA®), the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals, educators, financial services professionals and students who are committed to elevating the profession that transforms lives through the power of financial planning.

Zohlen is the founder of Inspired Financial, LLC—a fee-only wealth management practice that specializes in serving women in transition in southern California. Prior to founding Inspired Financial, she was a Relationship Manager at The Vanguard Group. She received her Bachelors degree from the University of Texas, her Master of Science from the Joint Military Intelligence College, and her MBA from Villanova University.

Zohlen is a CFP® professional and is past chair of the Financial Planning Association of California. She is on the Advisory Board for the Center for Investments and Wealth Management at the University of California at Irvine and has served in a variety of community leadership roles including the Board of Directors for WomanSage.

Prior to entering the financial services profession, Zohlen served as an intelligence officer in the United States Air Force. She is married with three terrific “bonus” children.



Skip Schweiss, AIF®

2020 FPA President-elect

Skip Schweiss currently serves as volunteer president-elect of the board of directors for the Financial Planning Association® (FPA®), the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals, educators, financial services professionals and students who are committed to elevating the profession that transforms lives through the power of financial planning.

Schweiss is president of TD Ameritrade Trust Company (TDATC) which offers retirement plan solutions and services for independent registered investment advisers using TD Ameritrade's trust platform and is also managing director of advisor advocacy and industry affairs for TD Ameritrade Institutional. In 2014, he was named by Investment Adviser magazine as one of its top 25 most influential people in the industry, was named "Fiduciary of the Year" by the Committee for the Fiduciary Standard in 2015, and received the Insider's Forum Leadership Award in 2016.

Prior to joining TD Ameritrade Institutional, Schweiss held a variety of management positions within Fiserv Investment Support Services, including serving as Executive Vice President of Fiserv Trust Company, which was acquired by TD Ameritrade Holding Corporation in February 2008. He holds a Bachelor's degree in business administration from the University of South Dakota and a Master's degree in finance from the University of Colorado. He has completed the Securities Industry Institute sponsored by the Securities Industry and Financial Markets Association (SIFMA) at the Wharton School of Business.

Schweiss resides in Denver with his wife, Lisa, and has three grown children. In his spare time he enjoys outdoor recreation, including road biking, hiking, and skiing. He devotes considerable time to assisting those in his community through Habitat for Humanity, Special Olympics, his church, and other causes.



Lauren M. Schadle, CAE

Executive Director and CEO

Lauren M. Schadle, CAE is the executive director and chief executive officer for the Financial Planning Association® (FPA®), the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals, educators, financial services professionals and students who are committed to elevating the profession that transforms lives through the power of financial planning.

She has worked in the association and not-for-profit sector since 1989. Prior to assuming the CEO role in October 2012, Schadle had been FPA's associate executive director and chief operating officer since 2006. She had joined FPA's predecessor organization, the Institute of Certified Financial Planners (ICFP), in 1996 as its director of membership and marketing. Before joining ICFP, she worked for the National Professional Management Corporation, an association management company focused on serving the medical profession. She also worked at the California Medical Association, first for its for-profit subsidiary Physicians' Advantage, and then subsequently led the overall marketing communication initiatives for the organization. In addition, Schadle served as public relations/media associate for New York-based Catalyst.

Schadle received her Bachelor of Science degree in communications from Rutgers University and her Master of Science degree in marketing from the University of Colorado. She served as the 2011-12 president of the Colorado Society of Association Executives and served on the CSAE board through 2013. She is a member of the American Society of Association Executives and received her Certified Association Executive (CAE) designation in 2005.



FPA Advocacy in 2020

To elevate the profession, the Financial Planning Association® (FPA®), in partnership with its chapters, members and coalition partners, has positioned itself as an advocacy force at all levels. The work the association is doing to forge relationships with policymakers ensures voices are heard and positions are known by those who bear the power to influence the trajectory of the profession. FPA has the backs of its members and will work tirelessly to be sure the voice of the financial planning community is resonating on The Hill, in state capitols, and by regulatory and certifying bodies.

FPA's Advocacy Policy and Vision:

- FPA advocates for elevating the financial planning profession.
- To elevate the financial planning profession, FPA advocates for the concept of one profession/one designation.
- FPA advocates that the one designation be the CFP® marks.
- FPA advocates for distinguishing financial planning from other types of financial advice.
- FPA advocates for our core member, the CFP® professional who practices financial planning.

Therefore, FPA's advocacy policies support the following vision: *That financial planning is delivered by a CFP® professional under a fiduciary standard of care, which supports establishing financial planning as an honorable profession—recognized in law and by the public—based on the CFP® marks and practiced by professionals who are required to adhere to the standards that the CFP® marks represent.*



Power of Financial Planning

Financial advice, which most people in financial services provide, is transactional. Financial planning is transformative...especially when it's delivered by a financial planner who is committed to working in a client-centered, fiduciary-based way. That is the **power of financial planning**...to transform lives. But to realize this power, those delivering financial planning need the necessary competency IN financial planning. Competency is paramount and people need to know that the financial planner they are engaging is actually doing financial planning and has the competency required to be a financial planner.

Besides a financial planner's willingness to be forthcoming on how they are compensated for their services and any material conflicts of interest, FPA believes there are five questions everyone should ask a financial planner to gauge their competency in financial planning.



Is a financial planner a CFP® Professional?

A financial planner who has earned the CFP® certification has demonstrated an ongoing commitment to accrue the necessary knowledge and experience to provide financial planning services to their clients. This is a starting point for financial planner competency.



What areas of expertise should a financial planner have?

Experience in retirement planning, tax, estate planning, education funding, insurance, cash flow, debt management and other areas are critical to the financial planning process. Even a base knowledge is required to ensure a financial plan is comprehensive.



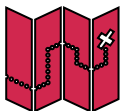
Does a financial planner have a specific area of specialty?

If the financial planner states they have a defined area of specialty, he/she must be able to outline the qualifications they have, including any additional education and certifications.



How long has a financial planner provided financial planning?

There is an art and science to financial planning that sometimes takes experience to master. Time also allows the financial planner to refine the relational skills needed. Ask the financial planner how long he/she has been providing these services.



How will a financial planner approach your specific situation?

What process does the financial planner take in doing financial planning? What systems do they have in place and how will the plan be developed, presented and implemented? Be sure the financial planner is sensitive to your needs and wants and will approach your situation in a manner that makes sense for you.

FPA’s public relations team is available to assist journalists with any requests for information, interviews and other needed support. If there is something we can do to help you in your reporting, please let us know. We look forward to hearing from you!



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The [Press Room](#) on the FPA website is a single source for journalists to learn all that is transpiring in the association.

- FPA members serve as expert sources on a variety of topics such as retirement planning, small business planning, family and marriage planning, and can also speak to client issues in a particular profession, or with different income and asset levels. Contact Ben Lewis or RYanne Harrah from FPA’s Public Relations Team at BLewis@OneFPA.org or RHarrah@OneFPA.org.
- Reporters working on deadline can submit their story query using FPA MediaSource—an automated system that sends the query to CFP® professional members of FPA across the country. Access [FPA MediaSource](#) today.

Publications:

- FPA’s award-winning [Journal of Financial Planning](#) features prominent writers and stories that enhance the knowledge and understanding of the evolving technical aspects of financial planning.
- The [FPA Practice Management Blog](#) is populated frequently with helpful posts on marketing, client skills, technology, HR/staff, compliance, operations and more.



FPA wants to help journalists do their jobs. That's why we created [FPA MediaSource](#)—an automated media query platform that connects journalists with financial planners who have earned CFP® certification and have demonstrated proficiency in all areas of personal finance and are standing by to help journalists with the stories they are writing/producing.

Here's how it works in six easy steps:

1. A journalist goes to the online form and submits a query.
2. The system sends an email to CFP® professional members of FPA who have opted-in to participate.
3. Interested members then go to an online form to provide their contact details and initial thoughts on the topic.
4. The system then sends the inquiring journalist an email with the replies submitted by members.
5. The journalist then vets the responses coming in and chooses the planner(s) they want to engage for the story.
6. The journalist then reaches out to those planners he/she wants to interview.

A couple things to know about the platform:

- We do not provide the journalist's name or email address to protect them from being sent information they don't want.
- When the deadline hits, the query is automatically shut off. This is done to prevent planners from responding to a query after the journalist has already filed their story.
- While it is understood and expected that some journalists will simply use what is submitted in the responses, it is encouraged that journalists let the member(s) know.
- If a journalist would like to speak to an FPA representative or get an official FPA position, they are encouraged to reach out directly to the FPA Public Relations Team.

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