

# FPA Chapter Diversity & Inclusion

provides knowledge, advocacy, community, and leadership to all those who need, support, and deliver professional financial planning.

[FPADiversity@OneFPA.org](mailto:FPADiversity@OneFPA.org)

Financial  
Planning  
Association

## chapter diversity & inclusion rubric

initiatives to help your chapter meet your diversity & inclusion goals



## LEADERSHIP INITIATIVES

---

- Chapter leadership participates in (D&I) initiatives in the calendar year
- Board participates in a D&I recruitment & retention training one time each calendar year
- Nominate diverse chapter board members to your board when nominations occur

## BOARD ADMINISTRATIVE INITIATIVES

---

- The chapter elects a Diversity & Inclusion Officer to the Board of Directors
- D&I Officer is included on board meeting agenda and gives an update on current diversity initiatives
- Diversity & Inclusion is included on leadership strategic planning meeting agenda

## POLICY INITIATIVES

---

- Create a D&I statement specific to chapter initiatives
- Create a recruitment policy with a section dedicated to recruitment and retention of diverse members, specifically that reflects the diversity of the community it serves

## COMMUNICATION INITIATIVES

- Once per quarter, Leadership has communicated D&I statement, strategy, & initiatives (internal & external) to membership through communication channels (newsletter, social media, etc.)
- Spotlight chapter activities impacting diverse populations within community

## VISABLE INITIATIVES

---

- At least once per year, the chapter participates in programming with a community or national minority financial planning organizations (e.g. community or national based AAAA)
- Once per year, the chapter observes no fewer than one diversity related milestone and/or event (e.g. Black History Month, Women's History Month)
- All marketing materials include pictures of diverse individuals

## LEARNING INITIATIVES

---

- Chapter membership attends programs that include diversity related content or are selected with diversity related considerations during the calendar year
- Speakers from diverse populations present on topics and issues impacting diverse communities related to the financial industry