

The Financial Planning Association® (FPA®) is the leading membership organization for CERTIFIED FINANCIAL PLANNER™ professionals and those engaged in the financial planning process. The primary aim of FPA is *to elevate the profession that transforms lives through the power of financial planning*. FPA's core policy is the CERTIFIED FINANCIAL PLANNER™ certification<sup>1</sup> and the standards it represents constitute the foundation of the financial planning profession. 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.

FPA provides support to nearly 19,000 members and 82 chapters and state councils. FPA supports high standards of professional competence, ethical conduct and clear, complete disclosure when serving clients. By providing opportunities for practice support, learning, advocacy, and networking at the national and chapter levels, FPA is truly indispensable in the advancement of CERTIFIED FINANCIAL PLANNER™ professionals. FPA members work with clients on topics ranging from budgeting, debt management, student loans, credit card debt, insurance, taxes, retirement, investments, and estate planning.

FPA is headquartered in Denver, Colorado, and is governed by a volunteer Board of Directors who is charged with setting the strategic vision for the organization. FPA's staff is dedicated to implementing that vision and creating an unparalleled membership experience.

## FPA Leadership

- Dennis Moore, MBA, CFP® – 2022 FPA President
- Skip Schweiss, CFP®, AIF® – 2022 FPA Chair
- James Lee, CFP® – 2022 FPA President-elect
- Patrick D. Mahoney – Chief Executive Officer

## FPA Advocacy Staff

- Josephine M. Colacci, Esq. – Public Policy Council

## Websites and Links of Interest

- [FPA Professional Website](#)
- [FPA Consumer Website](#)
- [Journal of Financial Planning](#)
- [FPA on Facebook](#)
- [FPA on Twitter](#)
- [FPA on LinkedIn](#)
- [FPA on YouTube](#)

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<sup>1</sup> Certified Financial Planner Board of Standards, Inc. ("CFP Board"), a 501(c)(3) organization that is independent of the Financial Planning Association, grants the CFP® certification to CERTIFIED FINANCIAL PLANNER™ professionals in the United States. CFP Board owns the trademarks CFP® and CERTIFIED FINANCIAL PLANNER™.