

NexGen Director

FPA Mission

The next generation is comprised of new and aspiring financial planners who come from a variety of life experiences and backgrounds. FPA gives them a professional home from which they can thrive.

Those entering the financial planning profession today do so in different ways. Some are students exploring financial planning as their potential vocation, while others are career-changers. Some are recent graduates preparing to take the CFP® examination, while others are joining firms at the ground level. The “next generation” is no longer defined by age but rather by where you are in your career.

FPA NexGen is an inclusive community of members of all backgrounds – no matter how they arrived in the profession. The community is ultra-collaborative, so if you have a passion for connecting with your peers, learning how you can be a better financial planner, and sharing insights, FPA NexGen is for you.

Specific Responsibilities

Community: Foster inclusive communities dedicated to the development of the next generation of CFP® professionals.

Education: Provide high-quality content about the practice, business, and profession of financial planning.

Career success: Promote the growth and quality of the next generation of CFP® professionals’ careers.

Advocacy: Promote FPA and CFP® professionals as the credible voice in financial planning.

- Promotes the Financial Planning Association and Chapter mission and purpose.
- Attends monthly board meetings, chapter meetings and chapter activities.
- Plans unique and engaging networking events. Look for opportunities to develop and build a community.
- Retains, engages, and inspires new NexGen talent to become involved in the local FPA chapter.
- Is a reliable and valuable resource for financial professionals in the Austin area.
- Facilitates awareness of the profession and how we operate amongst other allied professional groups (CPAs, CFAs, Lawyers, etc).
- Keeps the Board informed of all progress of events, networking, and leadership growth of our Next Generation of planners.
- Stays informed with FPA National NexGen to share best practices and work together to achieve the goals and vision of the FPA National NexGen community.
- Posts event photos on LinkedIn
- Provides ready-to-go content to Chapter Executive for website, invites, surveys and newsletter