



The Rationale

The continually changing landscape of the financial planning profession, the greater financial services industry, and increased competition mean FPA needs to focus on solidifying its relevance and impact for members and the profession.

The Goals



The Journey

Summit: FPA in 2034

By 2034, FPA will be the leading membership organization and trade association for CERTIFIED FINANCIAL PLANNER[™] practitioners and allied professionals by focusing on driving maximum value through delivering unmatched Practice Support, Learning, Advocacy, and Networking for practitioners and partners of all backgrounds.



Basecamp: FPA in 2026

With a united focus on being the partner in planning for CERTIFIED FINANCIAL PLANNER™ professionals, FPA is indispensable in supporting and developing the financial planners of today and tomorrow.

INITIAL THREE-YEAR IMPLEMENTATION PLAN

Start: FPA in 2024

As a CERTIFIED FINANCIAL PLANNER™ professional, FPA is your partner in planning by helping you realize your vision of success with practice support, learning, advocacy, and networking.