

# The FPA Competency Model™

## FAQ

### What is the FPA Competency Model?

A behavioral-based framework that outlines the key knowledge, skills, and traits that define excellence in financial planning—supporting both technical expertise and professional impact.

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### Who is it for?

- ✓ Students and aspiring planners
  - ✓ Early-career professionals
  - ✓ Experienced practitioners
  - ✓ Academics and educators
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### What does it include?

#### Six Core Competencies:

- Interpersonal Impact
- Professionalism
- Leadership
- Critical Thinking
- Client Communication and Care
- Advancing the Financial Planning Profession

Each includes defined sub-competencies and three levels of proficiency: Foundational, Intermediate, and Advanced.

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### How do I use it?

- 1. Take the Self-Assessment**  
Evaluate your current strengths and growth areas.
  - 2. Explore Your Learning Path**  
Receive personalized course recommendations.
  - 3. Advance with Confidence**  
Focus your time and energy where it matters most.
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## Where do I start?

Log in to the FPA Learning Center and select any competency to access the assessment and learning path.

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## Why did FPA create this?

To align learning, development, and leadership across the profession—grounded in real-world insight from planners, educators, and industry experts.

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## How is this different from CFP Board competencies?

The FPA Competency Model emphasizes *how* planners practice—focusing on behaviors and soft skills that enhance technical knowledge and elevate client care.

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## Is the model used in other FPA programs?

Yes. You'll see it integrated throughout FPA events, courses, articles, and member benefits—including the *Journal of Financial Planning*.

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## Can I use this with my team?

Absolutely! The model is ideal for team development, performance coaching, and mentorship planning. One-sheets and guides are available to support group use.

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## Need help?

Reach out to our Learning Team at [learning@onefpa.org](mailto:learning@onefpa.org) or visit <https://fpalearning.onefpa.org/FPACompetencyModel> to access assessments, one-sheets, and more.