

How to Use the FPA Competency Model™

A Quick Start Guide

The FPA Competency Model is your trusted framework for professional growth, designed to support you in delivering exceptional financial planning while developing the skills and confidence to lead at every stage of your career.

Whether you're exploring the profession, actively practicing, or leading a team, the model offers clarity and direction to help you grow with purpose.

Explore the Model's Structure

Start by familiarizing yourself with the key elements of the model:

- **Core Competency Topics:** The foundational skills, behaviors, and knowledge that define effective financial planning.
 - **Proficiency Levels:** A clear progression from entry-level to advanced practice.
 - **Behavioral Indicators:** Real-world examples that demonstrate what each competency looks like in action.
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Discover Your Current Proficiency Level

FPA offers **learning assessments** to help you identify where you are within the model. These assessments are designed to:

- Evaluate your current strengths
 - Highlight areas for growth
 - Align content based on your responses
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Follow Your Suggested Learning Path

Based on your assessment results or self-evaluation, explore curated resources aligned to your proficiency level:

- **On-demand courses** that develop specific competencies
 - **Recommended articles** that deepen your understanding
 - **Programs and events** that connect you with experts and peers
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Apply the Model

Use the model as a living tool in your professional journey:

- Guide your **annual learning goals**
 - Track your development as you move into new roles or areas of expertise
 - Align your work with **client expectations and best practices**
 - Prepare for new credentials or leadership roles within your organization or FPA
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Need Help Getting Started?

FPA is here to support your journey. Visit the [FPA Learning Center](#) to:

- Explore the **Competency Model and resources**
 - Take your first **learning assessment**
 - Access your **personalized learning path**
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Grow With Purpose. Lead With Confidence.

The FPA Competency Model is more than a framework—it's your partner in professional development. Let it guide your next step, open new opportunities, and strengthen your impact as a financial planning professional.