



Advance the Financial Planning Profession

Competency Focus

Expands the reach, capability, and positive impact of financial planning through professional advocacy, inclusive community-building, and service to the public. This competency supports the evolution of financial planning as a profession committed to equity, access, and lifelong contribution.

Sub-Competencies

- 1 Professional Advocacy
- 2 Growing the Financial Planning Community
- 3 Pro Bono Service

Proficiency Overview

FOUNDATIONAL

- Understands key laws and policies impacting the profession
- Shares information about financial planning with peers and the public
- Identifies communities in need of financial planning support

INTERMEDIATE

- Participates in advocacy efforts and leverages FPA resources
- Actively engages in professional associations and peer education
- Collaborates on pro bono efforts and raises awareness within the community

ADVANCED

- Develops and leads advocacy campaigns or legislative engagement
- Presents on behalf of the profession to influence decision-makers
- Builds long-term strategies to ensure equity and sustained community impact