



Leadership

Competency Focus

Advancing financial planning practice goals through others by fostering team development, personal influence, business growth, and professional innovation. Effective leadership brings relevancy and value to clients, organizations, and the profession.

Sub-Competencies

1

Builds Diverse and Effective Teams

2

Mentors and Develops Others

3

Personal Brand Development

4

Business Development

5

Business Model Innovation

Proficiency Overview

FOUNDATIONAL

- Builds trust and inclusiveness within teams
- Exchanges feedback and connects peers for support
- Articulates value of financial planning and explores career fit
- Establishes basic online presence and networks

INTERMEDIATE

- Aligns team strengths with business priorities and client value
- Provides timely feedback and role models learning behaviors
- Refines niche, strengths, and goals for brand growth
- Strengthens referral networks and expands client engagement

ADVANCED

- Leads equitable talent practices and team performance strategy
- Creates systems for coaching and mentoring
- Pursues high-impact career and leadership goals
- Develops influence and outreach strategies tied to brand and client needs