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WHAT IS THE FPA COMPETENCY MODEL™?

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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?

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- Students and aspiring planners
- Early-career professionals
- Experienced practitioners
- Academics and educators

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WHAT DOES IT INCLUDE?

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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?

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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?

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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?

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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?

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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?

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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?

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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?

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