

## The FPA® Competency Model™

# The How-to 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.

1

### 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.

2

### DISCOVER YOUR CURRENT PROFICIENCY LEVEL

FPA offers learning assessments to help you identify where you are within the model.

- Evaluate your current strengths
- Highlight areas for growth
- Align content based on your responses

3

### 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

4

### 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

5

### 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

6

### 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.