



June 23, 2025

FPA Board of Directors  
Financial Planning Association  
1290 Broadway, Suite 1625  
Denver, Colo. 80203

**Re: Post-Meeting Report of the OneFPA Advisory Council's May 29, 2025, Meeting**

Dear Colleagues,

The OneFPA Advisory Council Executive Committee ("ACEC") is pleased to provide this post-meeting report from the OneFPA Advisory Council's ("Council") **meeting on Thursday, May 29, 2025**. The meeting focused on the Council's one-year strategic plan to reconfirm the role of the Council and build its relevance, purpose, and engagement by the end of 2025.

The [one-year plan](#) was developed following the Council's in-person meeting at the FPA Chapter Leaders Conference and outlines five critical areas that must be addressed: (1) Clarify the Role and Accountability of Advisory Council Representatives, (2) Improve Communication and Information Flow, (3) Increase Chapter Support and Resource Utilization, (4) Enhance Engagement and Participation, and (5) Measure and Drive Impact. Members of the ACEC are leading the exploration and eventual implementation of these five areas.

Like previous meetings, the meeting featured breakout groups, with discussions and input collected on three questions prepared by the ACEC that will inform the next stages of the ACEC's work on the one-year plan. Those discussion questions, which were sent to all representatives five weeks in advance, were:

1. *What do you see as your purpose on the Advisory Council, and how do you envision making an impact through this role?*
2. *What tool, resource, or process would you like to have to communicate quickly and efficiently to the national board/organization?*
3. *What would motivate you to engage more in the Advisory Council?*

All input collected during the breakouts can be found in **Appendix A** at the end of this document.

**Key Themes from the Breakout Discussions**

1. **Clarifying the Purpose of the Advisory Council:** Representatives are eager to bridge the gap between chapters and national leadership, but there's some uncertainty about the Advisory Council's exact role. Are we here to advise, inform, advocate, collaborate, or do it all? Without a clear understanding of the Council's purpose, engagement can feel disjointed or just for show.
2. **Communication Woes:** A common frustration is the lack of clear and consistent communication. Often, input is shared, but feedback is not received or doesn't see any actions taken, which can lead to a

disconnect and disengagement. Plus, many representatives feel that FPA Connect, as a communication tool for the Council, could be more effective—there’s a lot of valuable information that gets lost in the shuffle or isn’t communicated with the urgency it needs.

3. **A Call for Structure and Accountability:** Many representatives are looking for straightforward processes, user-friendly tools, and clear expectations to ease the workload and enhance engagement. A more structured approach to submitting concerns, tracking progress, and understanding chapter needs could make a difference. Transparency is key, especially in decision-making processes and outcomes.
4. **Value and Impact Matter:** Engagement can flourish when representatives see the results and understand how efforts benefit the profession and the chapters. This is especially true for smaller chapters that may not have the resources. It’s essential that the Advisory Council brings tangible value, sharing data, success stories, and actionable ideas that motivate and inspire.
5. **Leveraging Peer Learning and Collaboration:** There’s a strong desire for more opportunities to learn from other chapters through shared experiences, advocacy successes, and creative engagement methods. Many see the Council as a space to brainstorm innovative solutions together, not just pass along updates. Regional collaboration and sharing across chapters would be beneficial.
6. **Timing and Reality Check:** While the current meeting schedule works, there’s a mismatch between preparation timelines and chapter board meetings, particularly for those that don’t meet often. Events like CLC occur during tax season, making it tough for leaders to participate. Additionally, materials often arrive too late for chapters to engage meaningfully, even when they seem well-timed from the ACEC’s perspective.
7. **Aligning National and Local Strategies:** Members see a disconnect between what’s prioritized at the national level and what local chapters really need. There’s a gap in understanding how national initiatives serve chapters and how input shapes these decisions. Many feel the weight of declining membership and revenue as pressing challenges, but often feel unsure about how to tackle them.

### Key Recommendations Moving Forward

- **Clarify Our Purpose:** Finalize and circulate a clear mission statement for the Advisory Council and a clear outline of representative roles, responsibilities, and expectations.
- **Consistent Updates:** Commit to emailing quarterly one-page summaries to keep representatives informed and engaged without digging through FPA Connect.
- **Streamline Council Work:** Offer tools like presentations, templates, and scripts that help representatives convey key messages back to their respective chapters. A standardized way for Council members to submit feedback on issues would also be warranted.
- **Show Us the Impact:** Regularly share updates on what’s changed because of the Council’s contributions and what’s currently needed to keep representatives motivated and involved.
- **Encourage Peer Learning:** Use Council meetings to highlight chapter successes, innovative ideas, and lessons learned that others could replicate.
- **Align Our Strategies:** Share FPA’s high-level strategic goals and discuss how Advisory Council members can support them at the chapter level.

- **Build Connections and Recognize Contributions:** Acknowledge the work of Advisory Council representatives and encourage meaningful connections.

The ACEC would like to underscore the importance of hearing from the Board on the feedback and input provided following each Council meeting. It is evident, based on feedback from this most recent meeting and from other Council meetings, that the lack of communication coming back from the Board to the Council is leading to a lack of motivation and engagement. We know the Board has been discussing ways to close the communication loop with the ACEC and Council. We appreciate the Board's interest in creating a more responsive and proactive communication flow with the Council and look forward to working with you to implement it.

In the meantime, the Council's next scheduled meeting is Thursday, August 21, at 4:00 p.m. ET. While the Council will continue exploring issues related to the one-year plan, we invite the Board to suggest topics and issues where input from the Council would be informative to the Board's strategic discussions and deliberations.

Respectfully Submitted by the OneFPA Advisory Council Executive Committee on Behalf of the OneFPA Advisory Council,

Lance Eaton, CFP® (FPA of Illinois) — 2025 Chair  
James Loftin, CFP® (FPA of Georgia)  
Aaron Clarke, CFP® (FPA of the National Capital Area)  
Thomas Schaffer, CFP® (FPA of the Triangle)  
Stacy McGinty (FPA of South Florida)  
Patty Zeto (FPA of Ventura County)  
Deshawn Peterson, CFP® (FPA NexGen)  
James Serrano, CFP® (FPA Diversity and Inclusion Committee)

Cc: FPA Professional Staff Leadership

## **Appendix A**

**What do you see as your purpose on the Advisory Council, and how do you envision making an impact through this role?**

- My purpose on the ACEC is to serve as a conduit between the collective FPA, my local chapter, and the leadership of the ACEC. I aim to communicate with the board and hold them accountable for those correspondences.
- Bring up concerns, what's working, and what's not working. Address the questions, summarize the concerns, and ensure consistent communication between what's being brought up and where the Board is acting on those communications. We don't want to feel like our voices are being ignored, too many steps, too much bureaucracy. For example, the speaker database. Where are we with this? We brought it up two years ago, but still no reply on why something isn't happening.
- Critical to understanding what the other chapters are doing. Opportunity to collaborate with other chapters to do joint work on meetings and CE. Opportunity to hear good ideas from other chapters that I can bring back to my local chapter.
- Communication between chapters and from chapters to the Board/National and vice versa (i.e., on issues, successes, member engagement, etc.).
- Advisory council members are a two-way conduit between local chapters and the national board. Their responsibilities include relaying chapter successes, challenges, and strategic directions to the board and vice versa.
- My role on the Advisory Council is to communicate to the Board of Directors and to my chapter's Board of Directors the concerns, successes, and directions that result from my participation in the Advisory Council meetings and my communications to the chapter members.

**What tool, resource, or process would you like to have to communicate quickly and efficiently to the national board/organization?**

- No Slack or workspaces. Nothing else I need to monitor. No more notifications.
- Email is preferred, but it's the lesser evil.
- Queue of actionable items
- Login portal. Submit a ticket (i.e., Zendesk). We won't have to reinvent the wheel. We can have an archive of all issues and items brought up to the board. Everyone could see, comment, and vote. There is no need for a notification and static.
- Use AI to transcribe and capture ideas from meetings to help move the idea-sharing process. Easy access to information.
- Better notification when changes are needed. More effective and efficient means. Maximize FPA Connect usage and delivery.
- Regionalize and have quarterly calls for collaboration and communication amongst chapters in specific regions.
- Should chapter executives be utilized more in this initiative?
- Advisory Council members could make a bigger impact if they had a form or template to bring back to their local chapters. A specific list of items to share would make it much easier, simplifying their position.
- It would be nice to have a forum to submit questions/issues. We can go both ways.
- Better utilization of FPA Connect will result in better consistency in communication.
- The national board is expected to specify what key updates and data (e.g., decisions, challenges, initiatives) it requires from local chapters.

- Members emphasized the need for a clear, distilled structure that reduces unnecessary details while preserving essential data, facts, and examples. Examples include the DOGE weekly reports and traditional leadership training meetings, where chapters previously shared and compared best practices.
- The current reliance on FPA Connect is seen as too passive; members recommend more active channels, such as direct emailed summaries or scheduled Teams/Zoom sessions.
- A one-page, digestible summary of key actions and successes should be sent directly to Advisory Council members instead of posting on Connect, where engagement is low.
- A quarterly meeting cadence is widely supported as the minimum frequency, with some members open to monthly brief updates (an hour per month).
- Meetings should align with quarterly milestones (e.g., January, May, August, November), possibly tied to tax or conference schedules.
- Advisory Council meetings should have a dual focus: Board decisions and upcoming agenda items are presented, and each chapter offers a “nugget” of success or innovative practice to be communicated nationally.
- The Council should gather key inputs from chapters about membership growth, revenue, best practices in programming, advocacy impacts, and operational updates.
- National board communications should include concise outcomes (e.g., “three key advocacy initiatives accomplished”) to relay back to chapters.
- Advisory Council meetings should serve as both a feedback channel from the Board and a forum for cross-chapter idea-sharing.
- The Advisory Council’s purpose should be clearly defined as both a reporting mechanism and a collaborative forum for best practice sharing.
- The communication format needs to be standardized: a definitive outline of what information the Board needs, at what frequency, and through which channel.
- Members agree on the importance of consistent communication, whether by email, direct virtual meetings, or a structured online platform with a clear format.
- Our major failure is communication from the Board. The second failure is providing enough information to each Advisory Council member, the input to help formulate the opinions that the Board is looking to receive. The third failure is expecting Advisory Council members to have the motivation to read the outcomes of each meeting. There is too much separation in the meetings, and with the lack of follow-up, members don’t feel they are making a difference. The process needs to be more conversational.
- Develop a quarterly one-page report on the Council's engagement and impact that is delivered prior to the meeting.
- Provide timely feedback with relevant information from FPA to local chapters.
- There are missing initiatives that could help some subcommunities (i.e., NexGen) improve their operations. The Advisory Council can serve as a forum to bring up these issues
- Advisory Council members could make a bigger impact if they had a form or template to bring back to their local chapters.
- Having a forum to submit questions/issues would be nice. It can go both ways.
- A defined mission statement and outline of volunteer responsibilities need to be shared with the chapters.
- The Board should clarify the areas and formats in which it wants to receive information rather than relying on Advisory Council-initiated reports.

#### **What would motivate you to engage more in the Advisory Council?**

- Seeing and hearing results.
- Tangible Benefits. Easy to find benefits and results.

- We will be more excited about these meetings once we see results and feel like we're being heard.
- What does FPA want from us? How do you expect us to engage? For example, CLC is in January, so there's no opportunity to engage with the incoming leadership. Review the CLC date for a more cohesive strategic planning.
- Provide a member-only financial report at the end and the beginning of the year. What's going on with our dues? The ability to hold them accountable.
- The perception of the Advisory Council for smaller chapters is that it would be great to engage with when they are more stable.
- The advisory council needs to deliver more to chapters, especially smaller ones, to strengthen and more cohesively enhance engagement and membership.
- I would be more engaged as the Advisory Council becomes more defined. However, due to its size and breadth, the Advisory Council may not be the place for greater collaboration.
- Questions to explore: Is the Advisory Council not meeting enough? Is the Advisory Council too "surfacey"? Is the Advisory Council too broad and needs more depth
- It has not been much of a two-way street. It is discussed, but nothing progresses on the two-way communication.
- The Advisory Council's goal is unclear. Is it cross-pollination between chapters or communication to FPA?
- We need the content and the Advisory Council homework sooner, not two weeks prior, so we have more time to get with our chapters, as some Boards may only meet once a quarter. *(Note: Standard procedure is that communications and homework go to all Advisory Council members at least five weeks in advance, not two weeks.)*
- How is our feedback heard?
- Connection and networking with other members in similar volunteer roles.
- Chapters and members need to see tangible value from the Advisory Council.
- If information/systems are simple and easy.
- Have issues that are brought up in the forum from local chapters in the Advisory Council meetings.
- Emphasize the results!
- Members expressed concerns about low attendance at some meetings and questioned whether their inputs drive change. They require direct feedback from the Board on how their communications were used, and visible impacts from the Council's input (e.g., KPIs).
- Leadership training and regular updates on statistical data (e.g., current membership numbers, financial performance) are considered motivational factors for continued engagement.
- Regularly learning how the Advisory Council members and meetings are making a difference. For instance, with the three outstanding problems (declining membership, declining revenue, and declining support from CFP Board), Advisory Council members are not shown the statistics to make the problems real.
- It does not feel like we are engaged as much as we should be due to the feedback loop and communication chain.

### **Other Issues Raised**

- Chapters are encouraged to collaborate on initiatives (e.g., combined study groups or "Planners Club") to share best practices.
- Small group sessions via Zoom can offer a more interactive format that encourages participation.
- Sharing concrete examples from local chapters (such as advocacy successes in Florida) could stimulate additional action and accountability.

- Several members noted that many local chapters struggle to see the benefits of national membership, citing difficulties in accessing resources buried on the website.
- There is a call for the Board to provide clear, regular updates on tangible benefits delivered in the past quarter (e.g., new initiatives or policy outcomes).
- Comparing the FPA with competitors (such as CFP Board) highlights the need for demonstrable value in both membership and mark protection efforts.
- Issues regarding declining membership, reduced revenue, and diminished support structures are recurring themes.
- Members are concerned about the long-term strategic direction and the perceived disconnect between national leadership activities (e.g., CEO searches, advocacy outcomes) and local chapter interests.
- There is a need for better synthesis of board meeting notes that are actionable and efficiently distributed so that all Advisory Council members are informed.
- CLC is during tax season. Visibility for what's happening between all the vested parties.
- Develop a "Your Learning Journey" professional workbook. A guide on your journey with the FPA chapter. Have conversations, get to know each other, collaborate, and bring great ideas to everybody. (via FPA of Arizona)
- Very happy and engaged locally, but the value on a national level is unclear.