



FPA Advisory Council

FPA LEAD 2026 TOWN HALL

WEDNESDAY, FEBRUARY 4, 2026

Welcome!



Lance Eaton, CFP®

2026 Chair

FPA Advisory Council

Welcome!



Dan Galli, CFP®

2026 President

Financial Planning Association

The Board/Council Connection



Welcome!



Dennis J. Moore, MBA, CFP®

Chief Executive Officer

Financial Planning Association

The FPA Advisory Council is Important!

What has come out of the Council's work?

- **Engagement and Retention**
 - Led to development of the "Your Partner in Planning" Value Proposition (supporting chapters to create their own versions)
- **Technology and Reporting**
 - The need to access information and resources on membership led to FPA overhauling technology to make reporting easier for chapters to access
- **Chapter Events and Programs**
 - Discussions on ways FPA can better support chapter programs and events led to partnerships with Kitces.com, Financial Behavior Keynote Group, and many others to lower speaker costs for chapters

The FPA Advisory Council is Important!

What has come out of the Council's work?

- **Journal of Financial Planning**
 - Discussions led to FPA launching a print publication (JFP Research Quarterly) that is sent to all members
- **Title Protection**
 - Discussion on how FPA should engage members, chapters, leaders, and others for input on title protection led to the development of FPA's engagement timeline
- **FPA Strategic Plan**
 - Discussed the plan and provided strategic input on the redevelopment of all FPA's "Practice Support" offerings

FPA Membership Status

As of December 31, 2025:



16,477
Total Members



11,697
CFP[®] Pro Members



4,780
Other Members

- This represents a slight dip from the end of December 2024
- We attribute some of that to those retiring from the profession, and continue to focus on more membership pipeline initiatives with new planners
- 2026 Membership Team goals and themes:
 - Expanding FPA's membership reach through group membership
 - Investment in the next generation of planners
 - Unique benefit offerings
- CFP[®] One-Year Comp Program: Retention of 24% in 2025

FPA Strategic Plan



FPA STRATEGIC PLAN:
BUILDING RELEVANCE AND IMPACT FROM 2024-2034

FPA

The Rationale

The continually changing landscape of the financial planning profession, the greater financial services industry, and increased competition mean FPA needs to focus on solidifying its relevance and impact for members and the profession.

The Goals

- 1 Articulate and reinforce FPA's role and vision in supporting and advancing financial planners of all backgrounds.
- 2 Define the programs, initiatives, benefits, and services foundational to FPA's role and vision.
- 3 Streamline and maximize financial and professional staff resources supporting FPA's role and vision.
- 4 Maximize revenue potential across the Association's service lines and FPA's role and vision.

The Journey

Summit: FPA in 2034



- The Board of Directors finalized the plan in December 2023
- 2024 focused on laying a foundation for the work that needs to be done for Practice Support, Learning, Advocacy, and Networking
- The efforts of the past 24 months will set us up for success in evolving our service lines and driving member value
- Many of the programs and initiatives you have seen over this year are a result of the strategic plan's first three-year sprint
- Work is beginning soon to develop the next three year "sprint" that will commence in 2027

FPA MediaSource

Newly designed platform is Live!



- Nearly 10,000 queries have been sent to FPA members from national, local, and regional news organizations.
- We improved the overall look and feel for members and journalists while adding new features, including member access to previous responses.
- Participation is free for all CFP® professional members.

FPAi Authority

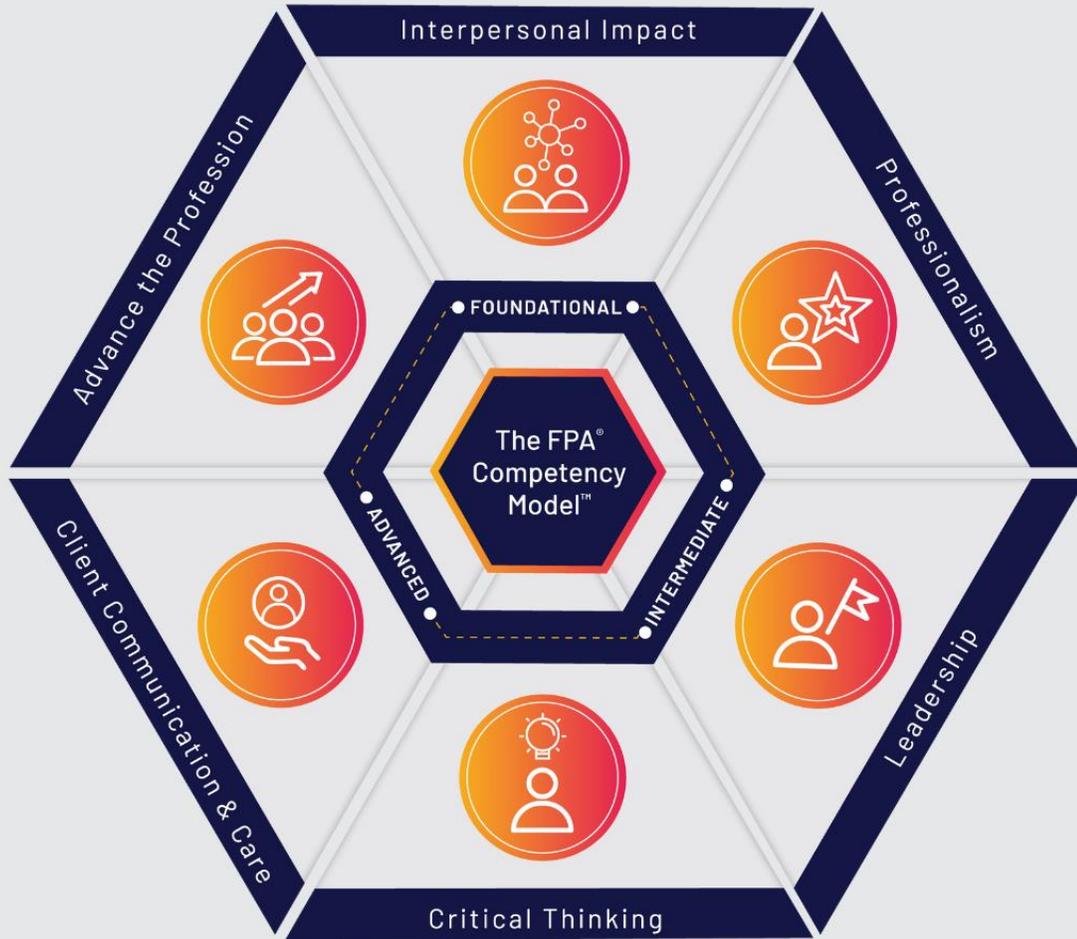
Tools for financial planners to leverage artificial intelligence in their practices!



- FPA has partnered with Capital Investment Advisors and FutureProof Advisor to better understand and leverage AI.
- A curated content library featuring informational videos, blog posts, and other content, including AI product demos and trending information in artificial intelligence.
- Matt Reiner, CFP®, CFA®, Managing Partner of Capital Investment Advisors, will speak at all FPA national conferences in 2026.

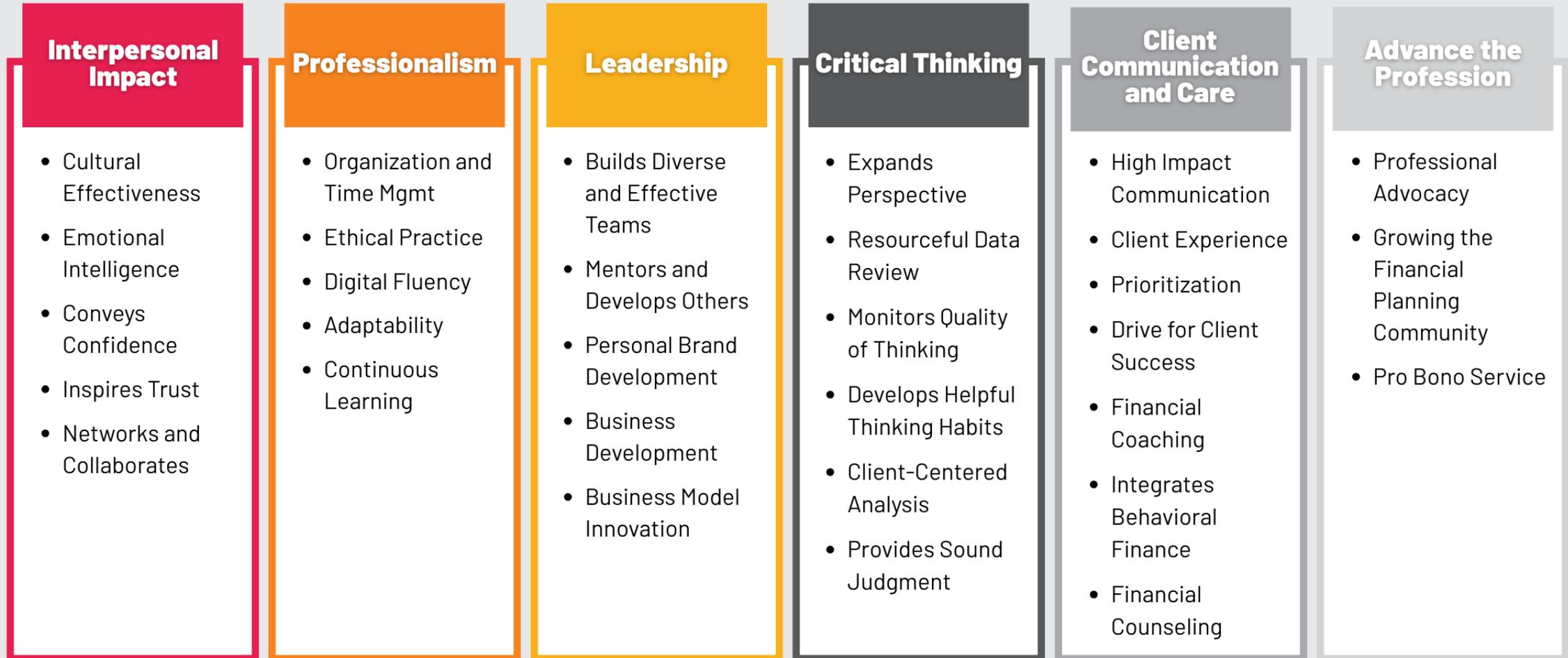


FPA Competency Model



- Culmination of many years of work and outlines key competencies and sub-competencies for a successful career.
- The model gives planners a roadmap that illustrates how they can progress in the profession.
- Supports planners as they develop their practice and build this profession for the betterment of clients and communities.

FPA Competency Model: The Competencies



FOUNDATIONAL

INTERMEDIATE

ADVANCED

FPA Certificate Programs



Psychology of Financial Planning Specialist™ Program

- Renewed with Dr. Brad Klontz and Dr. Charles Chaffin
- Nine hour program covering client behaviors, money beliefs, and communication strategies
- Earn nine CFP® CE credits



Cybersecurity for Financial Planners: An FPA Certificate Program

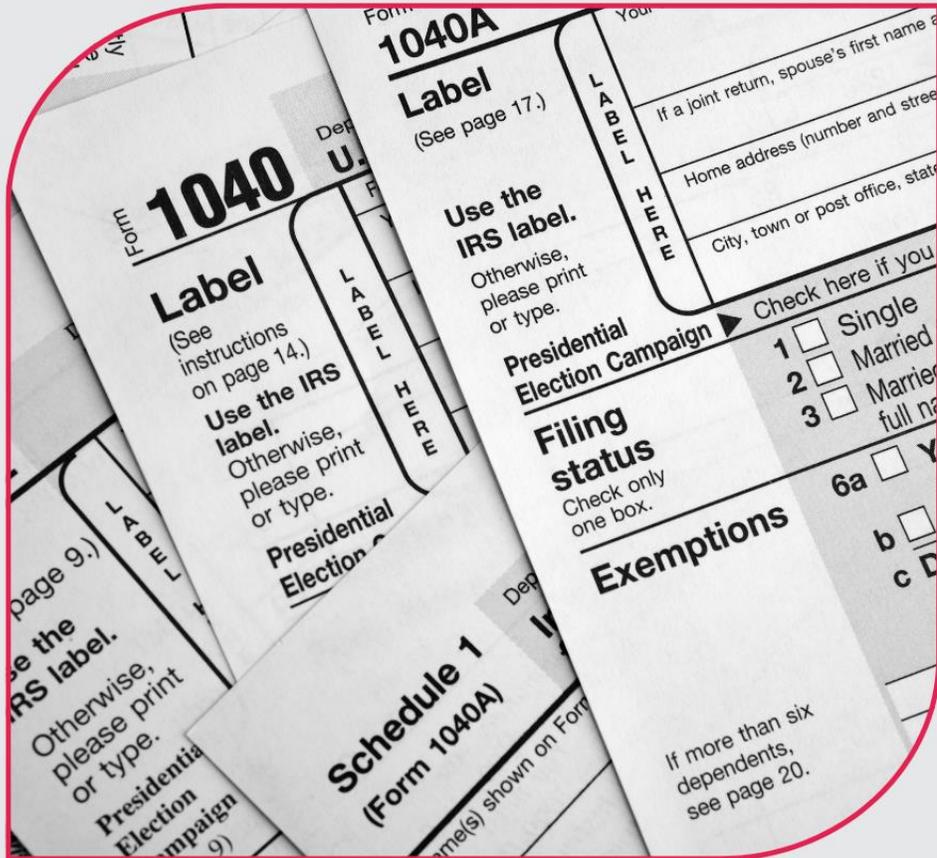
- Partnership with FCI Cyber and Buckler, LLC
- Self-paced and on-demand course for planners operating practices of all sizes
- Earn 3.5 CFP® CE credits

Legislative Activity



- In just the first half of the year, FPA tracked 217 bills and proposed regulations across the federal level, 42 states, Washington D.C., and Puerto Rico.
- FPA regularly identifies, analyzes, and responds to proposed legislation and regulation to safeguard the profession.

Advocacy: Tax Incentives



- FPA is pushing for tax incentives to make professional planning services more affordable.
- This could be accomplished through reinstatement of a miscellaneous federal tax deduction or creating a new tax credit.
- We're actively resisting professional services taxes.
- FPA recently defeated proposed taxes in Maryland and Minnesota with the help of grassroots efforts from hundreds of members and direct testimony from some.

Advocacy: Custodial Interference & 529 Plans



- FPA partnered with XY Planning Network, CFP Board, and NAPFA to influence Tennessee regulations, advocating for custodial definitions that protect both advisors and clients from unnecessary compliance burdens.
- We helped pass the Freedom to Invest in Tomorrow's Workforce Act, which allows 529 Plan funds to be used for private designations like the CFP® designation. This could broaden our reach.

Financial Literacy Activity



- FPA monitored 106 financial literacy bills this year.
- New laws in Colorado, Kentucky, and Texas now require dedicated high school financial literacy coursework.
- We are working with FPA of New England to support legislation in Massachusetts.

Evolving FPA National Events to Meet the Evolution of Financial Planning



Start Here

Grow Here

Transform Here

Elevate Here

Formerly:



Formerly:



Formerly:



Formerly:



**LET'S HAVE A
CONVERSATION**

What is FPA doing today that is living into that mission that we need to further build on?

What should we be doing moving forward to truly build financial planning and support you as financial planners?

Thank You!



Crystal Alford Cooper, CFP®

2026 President-elect

Financial Planning Association



Thank you for making FPA
Your Partner in Planning™