



FPA Student Program Toolkit

FPA is the home for the next generation of CFP® professionals. By providing diverse education, relationship building, information-sharing, and volunteer opportunities that create positive social change, we are the definitive resource for students and new professionals to gain knowledge and establish relationships.

Currently, there are not enough young CFP® professionals to meet the public's demand for quality financial planning. The future rests with new planners coming into the financial planning profession and to those providing resources and programming to help them jump-start and advance in their careers.

Engage future leaders of the profession and help them bridge the gap through their career development. There are many ways for chapters to get involved. This guide is designed to help chapters develop and implement programs in their areas. *Please note, you are not required to coordinate these programs – we just want to pass them along as ideas to support your chapter's student efforts.* By keeping students actively involved with your chapter, we are hopeful they become committed Certified Financial Planner™ professionals and FPA members.

In this guide you will find ways to collaborate with your local universities, best practices & tips and resources for your student program.

If you have any questions, please send an email to Students@OneFPA.org.

FPA Guide for Student Engagement

Value Proposition

The first thing your chapter will want to do is communicate a value proposition. It is an important piece of communication as it may be the #1 factor that encourages soon-to-be or new professionals to continue learning about FPA and the many benefits we offer. Below is the value proposition we suggest:

“FPA is the home for the next generation of CFP® professionals. By providing diverse education, relationship building, information-sharing and volunteer opportunities that create positive social change, we are the definitive resource for students and new professionals to gain knowledge and establish relationships.”

Add this statement on your website, event materials, printed publications, relevant FPA Connect communities, etc.

Collaborate with Your Local Universities:

FPA chapters form relationships with universities nationwide to increase awareness about FPA and grow the profession. By working with universities, we can get in front of thousands of students to spread the word about FPA and the CFP® certification.

Why Get in Front of Students?

- Chapters that engage students early in their career paths will have a greater success at keeping them actively involved in FPA throughout their career.
- Grow the future leaders of the profession and help bridge the gap between supply and demand of the delivery of quality financial planning.
- Sustain the viability and future of FPA and be recognized as an innovative thought leader and advocate for the CFP® practitioner and the profession.

How to Build a Relationship with Your Local University:

1. Reach out to the CFP Board Registered Program Director or faculty adviser who oversees the financial planning degree program at the university. [Find](#) a list of CFP Registered Program Directors in your area.
2. Assign one FPA Chapter Board Member to be the university and student liaison.
3. Introduce yourself to the CFP Board Registered Program Director or faculty adviser and share suggested student engagement activities.

Best Practices and Tips

FPA is the home for the next generation of CFP® Professionals. By providing diverse education, relationship building, information-sharing, and volunteer opportunities that create positive social change, we are the definitive resource for students to gain knowledge and establish relationships. Below are some examples of best practices to help you get started.

- Encourage students to join the FPA Activate Facebook community geared to help new or soon-to-be financial planning practitioners fast track their careers and develop their skills. Students can take part in vibrant discussions, seek guidance and advice from their peers, and get up to speed on the many ways FPA is supporting young members and career changers
- Encourage the FPA student community to participate in local practitioner chapter activities. Pair students up with a “buddy” to help them meet and engage with chapter members.
- Host a FPA student community meeting in conjunction with a regular chapter meeting. For example, the local chapter has meetings, students attend, and then it spins off to a student event.
- Encourage students to volunteer for chapter activities including the annual symposium, community service/pro bono programs, advocacy events, etc.
- Suggest a FPA student community member serve as a member of the chapter board of directors.
- Keep FPA student community open to all students. However, encourage students to enroll in FPA as student members so they have access to FPA resources
- Give “participation points” as part of your curriculum, participating in the FPA student chapter can be several points
- Host several student community meetings on campus and invite your chapter. Share information about the profession, trends, etc.
- Direct students to the FPA Job Board to identify internship and job opportunities.
- Check to see if your chapter hosts “Shadow Days,” where members volunteer to have students shadow them at work for a 1/2 to full day
- Ask your chapter if it offers scholarships for students to attend chapter or national events, cover costs for CFP® Exam preparation, etc.
- Invite the chapter to make a campus visit to share information with students. Ask the chapter if they can do a presentation. FPA has a presentation that covers why to become a CFP® professional, career paths, FPA resources, etc. that can be delivered to your students.

FPA Student Program Resources

- [FPA Activate Facebook Community](#): Geared to help new or soon-to-be financial planning practitioners fast track their careers and develop their skills.
- Get connected to your local NexGen community! There are dozens of local communities affiliated with FPA chapters holding events, social gatherings, and other opportunities to connect. Contact fpnexgen@onefpa.org to be introduced to your local chapter's NexGen Director. A full list of Local Leaders is posted on the [FPA NexGen page](#) on FPA Connect.
- Participate in various [Knowledge Circles](#) where you can share with and learn from your financial planning peers.
- [Become an FPA member](#). Aspiring Financial Planner membership are \$50 annually.

Scholarships:

- Chapter Scholarships: Through the FPA Member Advantage Program, education providers will provide CFP® Board Certificate Program scholarship(s) to qualifying chapter members.
- [Diversity Scholarship](#): Merit-based scholarship program that awards recipients to attend a FPA conference, collaborate with the FPA community, and promote inclusivity and creativity with the financial planning profession.