February 12, 2026

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

Re: Post-Town Hall Report of the FPA Advisory Council/FPA Board of Directors Town Hall on February 4, 2026

Dear Colleagues,

The FPA Advisory Council Executive Committee ("ACEC") is pleased to provide this post-meeting report from the FPA Advisory Council ("Council") and FPA Board of Directors ("Board") **Town Hall on Wednesday, February 4, 2026**. The Town Hall was an official kickoff to the 2026 Communications Plan that the ACEC formulated in 2025 to streamline communication between the Council and Board and foster a tighter connection between the two entities.

The Town Hall was attended by approximately 50 people, including members of the Council and all Board members in attendance for FPA LEAD 2026. The two-hour Town Hall featured an update on FPA activities from FPA CEO Dennis Moore, CFP®, and 2026 FPA President Dan Galli, CFP®, and was followed by time for questions and discussion. The conversation touched on many programmatic and operational issues. FPA staff in attendance took notes and combined them to develop this post-Town Hall report for the Council, Board, and staff. The main takeaways and action items are outlined below.

Top Themes from the Town Hall

- Grow CFP® professional penetration in FPA membership through stronger alignment with CFP Board and presence at local CFP Connections events.
- Rebuild the student pipeline (universities, academics, internships/jobs), revisit pro bono participation under supervision, and leverage the CFP® Competency Standards experience hours.
- Strengthen large-firm, solo, and small-firm engagement (group memberships, solo planners) and increase national/local visibility and storytelling.
- Clarify and communicate value while reducing message overload by targeting communications.
- Equip chapters with data and tools (dashboards, reporting, dues/retention analysis, CRM guidance, training, and backups).
- Sharpen advocacy communications (focus areas, wins, live tracking, more intuitive Policy Center).
- Address pricing and member journey, especially for the post-first-year glide path (years 2-5).
- Lower chapter operating friction (national hotel discounts, event-space agreements, chapter website expectations).

Priority Issues Identified

1. CFP® Membership Growth and Visibility
    - Increase penetration of CFP® professionals in FPA membership. Building visibility and value proof is essential.

    - CFP Board relationship is strong nationally, but we need more joint presence locally (e.g., on stage at local CFP® Connections events).
    - Grow group memberships with a clearer value narrative.
2. Student Pipeline and Early-Career
    - Expand university outreach (professors, academics, program partners like Kaplan/Danko, AFS, etc.).
    - Focus on jobs/internships pathways.
    - Pro bono participation for students: keep the CFP®-supervised requirement for liability, but review policies for safe expansion (mentoring, supervised service, campus financial counseling tie-ins).
    - Leverage new CFP® Competency Standards (up to 500 hours of experience toward CFP® certification) to position FPA experiences.
    - Collect and amplify student success stories (social, chapters, events).
3. Value Communication and Targeting
    - Many members/prospects don't perceive the full value, so ensure a consistent, simple value proposition across national/chapter touchpoints.
    - Reduce communication overload with targeted messaging and better profile data (within FPA constraints).
    - Aggressively promote new programs and benefits, including FPA MediaSource, FPAi Authority, Competency Model, and Residency.
4. Large Firms and Solo Planners
    - Foster large-firm partnerships beyond sponsorships (SME access, programs, group memberships).
    - For solo planners, show up at events that cater to their needs and translate FPA benefits for solo practices. Utilize chapters as amplifiers.
5. Chapter Support, Data, and Systems
    - Clarify dues (national vs. local) and communicate simply.
    - Expand chapter access to membership reporting/dashboards and on-request dues/retention analysis.
    - CRM guidance: HubSpot licensing has cost limits. Explore discounts for chapters or provide vetted alternatives.
6. Advocacy Communication
    - Clarify advocacy focus areas; provide timely, targeted updates and live issue tracking, especially for FPA's advocacy priority areas.
    - Improve Policy Center UX so wins and current actions stand out.
7. Member Journey and Pricing
    - After the first year free for new CFP® professionals, explore an "escalating glide path" to full dues.
    - Analyze member journeys and develop programs for years 2–5 to increase retention and engagement.
8. Event Logistics and Cost Relief
    - Explore national hotel/event-space discounts (e.g., Hilton/Marriott) and blanket agreements to relieve chapter budget pressure.
    - Opportunity to identify event space within partner or member organizations. Low to no-cost options.

Other Issues and Observations

- Chapters and Websites: Three options exist (self-hosted, FPA-hosted Drupal, Connect mini-sites). Align expectations and inform the chapters on options.

- Forums: FPA Forums (e.g., All-Member Forum) are highly valuable but behind the member firewall. Consider safe, redacted samples for promotion.
- External Relationships: Maintain touchpoints with CFP Board, NAPFA, XYPN, among others. Consider outreach to FINSECA.
- Onboarding: FPA has an onboarding tool/packet and templated materials for chapter branding. Ensure chapters know and use them.
- Local Ingenuity: Chapters often secure great local programs and sponsorships. Capture and share these tactics across all FPA chapters.

Open Questions and Issues

1. Scope for student pro bono under CFP® supervision. What specific activities are permitted, and what insurance coverage applies?
2. Local CFP® Connections presence. What are the target markets and cadence for 2026, and what can FPA do to have a more robust presence?
3. Advocacy "live" tracking. What granularity (national/state), and how often updated?
4. National hotel/event agreements. What are the preferences for chains, geographic coverage, minimum booking volumes, and other criteria?

Again, this Town Hall is just the first step in a robust schedule of communications between the Council and Board throughout the year. We look forward to further engagement with the Board this year and eagerly await your thoughts on the Town Hall and next steps in the Council Update email that will be sent to all Council representatives on March 5.

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

Lance Eaton, CFP® (FPA of Illinois) — 2026 Chair
James Serrano, CFP® (FPA Diversity and Inclusion Committee) — 2026 Co-chair
Aaron Clarke, CFP® (FPA of the National Capital Area)
Thomas Schaffer, CFP® (FPA of the Triangle)
Stacy McGinty (FPA of South Florida)
Pattye Zeto (FPA of Ventura County)
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Cc: FPA Professional Staff Leadership