



December 5, 2025

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

Re: Post-Meeting Report of the FPA Advisory Council's November 20, 2025, Meeting

Dear Colleagues,

The FPA Advisory Council Executive Committee ("ACEC") is pleased to provide this post-meeting report from the FPA Advisory Council's ("Council") **meeting on Thursday, November 20, 2025**. The meeting focused on the Council's finalized plans for 2026 to improve the flow of communication between the Council and the FPA Board of Directors ("Board"), and between the Board and the Council. Specifically, the Council focused on providing input to the Board regarding the planned Board/Council Town Hall to be held at FPA LEAD 2026 on February 4. Feedback, which led to the development of a series of recommendations (offered in this report), was based on two open questions posed to the Council during the meeting:

1. *For the town hall at FPA LEAD 2026, what issues or topics do you want the Board to address?*
2. *What can we do to better support representatives in 2026?*

Based on the discussion, the ACEC has distilled the feedback into "Recommendations to the Board/Staff" and "Recommendations to the ACEC". While much of what is outlined are recommendations that are much more operational, each can be used to inform what the Board should discuss at the town hall at FPA LEAD 2026 in February.

Recommendations to the Board/Staff

- **Develop a Chapter Intelligence Toolkit:** Chapters need ongoing insight, not ad-hoc reports, to target recruitment, outreach, and programming. It was suggested that FPA develop a reusable, self-serve toolkit for chapters to analyze member engagement (local and national), track prospect universes, and view national event participation within chapter ZIP codes.
- **Develop a "National Value" Slide Deck:** Consistent, credible messaging and promotions from FPA that chapters can easily drop into chapter promotions can improve member understanding and recruitment. To help, FPA should maintain a standardized, always-current slide pack highlighting FPA benefits, posted in the Chapter Leader Portal and refreshed quarterly; retain a "request custom" option.
- **Provide Chapter-Level Event Participation Insights:** To help empower chapters to convert interest into local engagement and membership, FPA should report to chapters about local member attendance at national programs. It was suggested that, after each national event, FPA should deliver a secure chapter-level list (members and nonmembers in chapter zip codes) of those who attended, along with simple outreach templates.
- **Provide Benchmarks and Playbook for First-Year CFP® Comp Program:** Chapters want to close any gap between national retention for the first-year CFP® comp program and what they are seeing locally. The

Council asks FPA to publish national retention benchmarks, chapter-level comparative data (where feasible), and a practical “what works” playbook. Feature top-performer lightning talks at LEAD and in a webinar.

- **Clarify 2026 Advocacy Priorities and Visibility:** Chapters need clear signals to inform local conversations and member value storytelling. FPA should provide a quarterly, plain-language 2026 Advocacy Brief covering Board priorities, PPC pipeline, and a financial literacy heat map that shows (a) states with enacted requirements, (b) where FPA influenced outcomes, and (c) active bills with FPA roles.
- **Define the Profession’s Pressing Issues and Title Protection Status:** Chapters need alignment on the “why” and “what next” to guide member dialogue. To help, the Board should present its view of the top five issues for planners (with rationale and expected FPA responses) and provide a concise status/history on Title Protection (what was pursued, outcomes, status, etc.).
- **Provide CEO Search Communications:** To help reduce speculation and strengthen trust in governance, FPA should publish a concise, shareable paragraph on the CEO search process that reps can use with chapters to ensure consistency.

Recommendations to the ACEC

- **2026 Advisory Council Cadence:** Make it easy for reps to collect broad input, not just their personal opinion, by reinstating a predictable rhythm. Before each Council meeting, send a turnkey pack (one-pager brief, 3–5 talking points, a 10-slide deck, and a simple response form with rank/yes-no options).
- **Close the Loop with the Board:** Reps want confirmation that input is heard and applied. The Board should commit to a brief, written response after every Council meeting (what we heard, what we’ll do, what needs more study), plus a year-end summary message.
- **Virtual Option for Town Hall at FPA LEAD:** Ensure equitable access to the town hall for chapters with travel constraints. The ACEC and Board need to schedule a virtual “Part II” town hall within two weeks that mirrors the in-person dialogue with the Board.

This meeting was the Council’s final scheduled meeting of 2025. As we prepare the Council’s activities for 2026, we invite the Board to be active participants to ensure close collaboration and support. We have much planned for the next year, so execution will be critical.

We look forward to working with all of you.

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