

# FPA LEAD 2026 Agenda

*Continue to check back as the schedule will be updated as new details become available!*

Wednesday, February 4	
9:00 AM – 5:00 PM	Chapter Executive Pre-conference Meeting
1:00 PM – 2:00 PM	Pre-conference Training
2:00 PM – 4:00 PM	Advisory Council Meeting, Invitation Only
5:30 PM – 6:30 PM	President’s Reception
7:00 PM – 9:00 PM	Chapter Executive Dinner
Thursday, February 5	
7:30 AM – 8:30 AM	Networking Breakfast
8:30 AM – 9:30 AM	General Session
9:30 AM – 9:45 AM	Networking & Coffee Break
9:45 AM – 10:30 AM	General Session
10:30 AM – 10:45 AM	Networking & Coffee Break
10:45 AM – 11:45 AM	<p>Breakout Sessions Block #1</p> <ol style="list-style-type: none"> <li>1. President and President-elect Foundations: This interactive session provides the orientation current presidents and presidents-elect need to lead their chapter with confidence.</li> <li>2. Membership 101: Join FPA’s expert membership team to learn everything you need to know to manage local membership operations.</li> <li>3. Pro Bono Essentials: Join us to learn steps, best practices, and resources for creating and augmenting a sustainable pro bono program for your chapter. FPA’s Community Engagement expert will prepare leaders for how to engage local organizations, create local programs, and support national initiatives in this engaging session.</li> <li>4. Public Relations Fundamentals: Learn from the experts at FPA regarding how to engage local media to amplify your chapter’s message to grow membership, promote your chapter, support partners and more!</li> </ol>
11:45 AM – 1:15 PM	Networking Lunch
1:15 PM – 2:15 PM	Conversation Carousel with FPA Staff: Learn what resources and support are available to you and your chapter.
2:15 PM – 2:30 PM	Networking & Coffee Break
2:30 PM – 3:30 PM	<p>Breakout Sessions Block #2</p> <ol style="list-style-type: none"> <li>1. Chapter Health: Is your chapter set up for long-term success? From smooth leadership transitions to organized document storage, timely tax filings, and overall operational health, there’s a lot that keeps a chapter running strong. Join us for a practical, interactive session where we’ll unpack the essentials of chapter health.</li> <li>2. Learning: Content is king, but how do you get outside of the typical CE construct and bring engaging content to your members that encompasses the growing profession? Join us for an interactive session to talk about it all!</li> </ol>

	<p>3. Your NexGen Strategy: Join FPA NexGen Chair Lillian Turner to learn about national NexGen initiatives, local opportunities and how to leverage NexGen members in your chapter engagement and leadership.</p> <p>4. Membership Orientation Panel: Join Chapter Volunteers and Executives as they share the importance of effective new-member onboarding, engaging newly minted CFP® professionals, and strengthening your Chapter's overall membership experience, and ways to strength your Chapter's Membership experience.</p>
3:30 PM – 3:45 PM	Networking & Coffee Break
3:45 PM – 4:45 PM	<p>Breakout Sessions Block #3</p> <p>1. Marketing Strategy for Chapters: FPA's Marketing gurus will be on hand to discuss best practices, technology and ways to maximize your chapter's messaging to as many audiences as possible.</p> <p>2. Maximizing Partnerships: Learn how to develop mutually beneficial relationships with your partners to ensure that everyone reaches their goals. Learn from partners how to engage with them and how to approach sponsorship conversations.</p> <p>3. FPA Competency Model: The FPA® Competency Model™ is your roadmap for growth and excellence in the financial planning profession. Grounded in real-world behaviors and aligned with the evolving needs of clients, teams, and the profession, this model helps you navigate your unique path—whether you're just starting out, deepening your expertise, or guiding others in the profession.</p> <p>4. Chapter Executive and Board Relations: Join us to understand how chapter executives and boards should work together. We'll discuss typical duties of a chapter executive, roles of the board, and how to leverage synergies and expertise for a long-term, positive partnership.</p>
4:45 PM – 5:45 PM	Pro Bono Training
5:45 PM – 6:45 PM	Reception
Evening	Dinner on Own
<b>Friday, February 6</b>	
8:00 AM – 9:00 AM	Networking Breakfast
9:00 AM – 10:00 AM	General Session
10:00 AM – 10:15 AM	Networking & Coffee Break
10:15 AM – 11:15 AM	<p>Breakout Session Block #4</p> <p>1. State of Membership: FPA will provide analysis regarding our current membership, opportunities, and strategies for 2026 and beyond. Join us to learn about where we are, what's coming, and how your chapter can leverage this important work.</p> <p>2. Chapter Revitalization Panel: Join Chapter Leaders and Executives as they share how to spot trouble areas within your Chapter and the actions you can take to strengthen them.</p> <p>3. Diversity, Equity and Inclusion Basics: Intro of FPA DEI Handbook</p>

	<p>4. Student Engagement: Students are the future of the profession and an integral part of FPA's membership. Learn how to create and leverage relationships with students, local colleges and universities, and support student communities.</p>
11:15 AM – 12:00 PM	Community Time
12:00 PM – 1:00 PM	Networking Lunch
1:00 PM – 2:00 PM	<p>Breakout Sessions Block #5</p> <p>1. Volunteer Engagement: Working with volunteers is one of the most important roles of a chapter leader. It's also the most complex. Join us to learn strategies for recruiting, engaging and retaining volunteers during this interactive session.</p> <p>2. Advocacy Roundtable: Join us to discuss local Advocacy and more during this interactive session.</p> <p>3. Leveraging National Benefits Locally: Learn how national programs like Knowledge Circles, JFP Study Groups, and awards, and more, can strengthen your Chapter.</p> <p>4. Career Changer Strategies: Career Changers are a growing segment of FPA membership. While they are new to the profession, their needs are different based on their life experiences. Join us to learn how to engage this important, emerging member.</p>
2:00 PM – 2:15 PM	Networking and Coffee Break
2:15 PM – 3:15 PM	General Session