FPA LEAD 2026 Agenda

Wednesday, February 4	
9:00 AM – 5:00 PM	Chapter Executive Pre-Conference Meeting
12:00 PM -2:00 PM	Lunch & Learn: CFP Ethics Training (CFP and IAR CE Eligible) Speaker: Crystal Cooper
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: Leadership Fundamentals with Chris Smith of PSBLTY
9:30 AM – 9:45 AM	Networking & Coffee Break
9:45 AM – 10:30 AM	General Session: FPA Town Hall
10:30 AM – 10:45 AM	Networking & Coffee Break
10:45 AM – 11:45 AM	Breakout Sessions Block #1 1. President and President-elect Foundations: This interactive session provides the orientation current presidents and presidents-elect need to lead their chapter with confidence. 2. Membership 101: Join FPA's expert membership team to learn everything you need to know to manage local membership operations. 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. This session will prepare leaders for how to engage local organizations, create local programs, and support national initiatives. 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!
11:45 AM – 1:15 PM	Lunch and Learn: FPA Partners "One Big Idea"
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	Breakout Sessions Block #2 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. 2. 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. 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. 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.
3:30 PM – 4:00 PM	Networking and Competency Model Pizza Deep Dive!
4:00 PM – 5:00 PM	Breakout Sessions Block #3 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. 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. 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? What elements are eligible for IAR CE? Join us for an interactive session to talk about it all! 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.
5:15 PM – 6:15 PM	FPA Pro Bono Financial Planning Training: This training helps financial planners understand the basics of how to provide pro bono services to underserved members of the community. FPA requires that all members complete this course before providing any pro bono services.
5:45 PM – 6:45 PM	Reception
Evening	Dinner on Own
Friday, February 6	
8:00 AM – 9:00 AM	Networking Breakfast
9:00 AM – 10:15 AM	General Session: Artificial Intelligence with Matt Reiner
10:15 AM – 10:30 AM	Networking & Coffee Break
10:30 AM – 11:30 AM	Breakout Session Block #4 1. State of Membership: FPA will provide analysis regarding our current membership, opportunities, and strategies for 2025 and beyond. Join us to learn about where we are, what's coming, and how your chapter can leverage this important work. 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. 3. Diversity, Equity and Inclusion Basics: Intro of FPA DEI handbook. 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.
11:30 AM – 12:45 PM	Lunch Session: Foundation for Financial Planning Remarks with Rachel Roth, Senior Director, Grants & Programs
12:45 PM – 1:45 PM	Breakout Sessions Block #5 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. 2. Advocacy Roundtable: Join us to discuss local Advocacy and more during this interactive session. 3. The *Journal of Financial Planning* for Chapters: Join us for an inside look at *the Journal of Financial Planning* and its role in shaping the profession's thinking and practice. This session will explore what makes the Journal unique from other financial publications, how to apply peer-reviewed research in real-world planning, and why contributing to the Journal matters for advancing the profession. FPA chapter leaders will learn how to engage with the Journal's editorial process to amplify their chapter's impact and advance the financial planning profession. 4. AFCPE Panel Session – The Bridge between Financial Counseling and Financial Planning when conducting community outreach and Pro Bono services.
1:45 PM – 2:00 PM	Networking and Coffee Break
2:00 PM – 3:15 PM	General Session: Applied Curiosity with Carla Johnson *The hidden power behind breakthrough ideas* Curiosity is more foundational to an organization's performance than we ever realized. In fact, the highest-performing groups have a deeply curious culture that values rich experiences and offbeat schools of thought. Combining curiosity with a profoundly effective process of applying it sets companies on an accelerated path to innovation and performance. Curiosity's also the antidote to burnout, apathy, and disengagement. Curious companies are financially and culturally healthy companies.