

## **NexGen Director - Role & Responsibilities**

FPA NexGen supports new and aspiring financial planners from all backgrounds and career paths. Whether students, career-changers, recent graduates, or early-career professionals, NexGen provides a collaborative community where emerging planners can learn, connect, and grow. The NexGen Director leads this effort within the Austin Chapter, fostering community, education, career development, and advocacy for the next generation of CFP® professionals.

### **Core Pillars of NexGen**

- **Community:** Build inclusive communities dedicated to developing the next generation of CFP® professionals.
- **Education:** Provide high-quality content related to the practice, business, and profession of financial planning.
- **Career Success:** Support the growth, development, and career advancement of emerging financial planners.
- **Advocacy:** Promote FPA and CFP® professionals as the credible voice of financial planning.

### **Specific Responsibilities**

#### **1. Leadership & Chapter Engagement**

- Promotes the mission and purpose of the Financial Planning Association and the Austin Chapter.
- Attends monthly Board meetings, chapter meetings, and chapter activities.
- Serves as a reliable and visible resource for emerging financial professionals in the Austin area.

#### **2. Community Building & Engagement**

- Plans unique, engaging networking events that foster community among NexGen members.
- Identifies opportunities to build and strengthen the NexGen community throughout the year.
- Retains, engages, and inspires new NexGen talent to become involved in the local FPA chapter.
- Facilitates awareness of the financial planning profession among allied professional groups (CPAs, CFAs, attorneys, etc.).

#### **3. Communication & Collaboration**

- Keeps the Board informed about NexGen events, networking efforts, and leadership development within the community.
- Stays connected with FPA National NexGen to share best practices and align with national goals and vision.
- Posts event photos on LinkedIn to highlight NexGen activity and engagement.
- Provides ready-to-use content to the Chapter Executive for:
  - Website updates
  - Event invitations
  - Surveys
  - Newsletters