



September 4, 2025

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

**Re: Post-Meeting Report of the OneFPA Advisory Council's August 21, 2025, Meeting**

Dear Colleagues,

The OneFPA Advisory Council Executive Committee ("ACEC") is pleased to provide this post-meeting report from the OneFPA Advisory Council's ("Council") **meeting on Thursday, August 21, 2025**. The meeting focused on the Council's recommendation to the FPA Board of Directors ("Board") to create a more consistent, impactful two-way flow of communication between the Board and the Council. The recommendation was presented, discussed, and ratified by the Board at their August 25, 2025, meeting.

The recommended communications plan was presented to the attendees, which was followed by an open discussion based on two core questions. The feedback on those questions was collected to help inform the execution of the communications tactics and the type of information Council representatives want throughout the year. Those discussion questions, which were sent to all representatives five weeks in advance, were:

1. *What are the bigger picture, strategic issues you want to hear from the FPA Board about at the town halls?*
2. *In the various updates and communications (email and video), what information is most important to you and your chapter/community?*

Based on the discussion, the ACEC has distilled the feedback into key themes, specific guidance, and other areas of input.

**Key Themes**

- **Two-way, predictable communication:** Chapters want a closed communication loop with clear evidence that the Board and staff review Council input and what decisions or actions it influenced. "Drips" aren't enough; they want cadence and accountability.
- **Chapter-ready deliverables:** Leaders need succinct, forwardable materials (such as one-pagers, slides, and bullet points) that they can easily share with their boards and members.
- **Value of membership:** Not generic lists; specific stories and proof points by members (new planner, mid-career, firm owner, etc.). Leaders want quick links they can use when asked, "What do I get for \$500?"
- **Data and tools to target outreach:** Demographics, career stage, firm type, and geographical heat maps. Desire to segment specific operational guidance by chapter size (small/medium/large) since needs differ.
- **Access and inclusion:** Consider a virtual option for the CLC town halls. Consider easier ways for time-strapped volunteers to contribute (polls, micro-surveys).
- **Board presence and accountability:** Board members participating in Council breakouts during meetings.

- **Centralized channel over diffusion:** If FPA Connect is “the place,” it needs activation and moderation. Otherwise, create a single, clearly owned home for Council and Board dialogue.

## Guidance for 2026 Town Halls and Communications

- **A visible feedback loop:** Here’s what we heard, what the Board discussed, decisions made and their status, and what’s next.
- **Specific wins/examples:** Highlight actions FPA took to support chapters that Council representatives can take back to their chapters (e.g., FPA stepped in to stabilize X chapter operations).
- **Data snapshots:** Offer quarterly member profile highlights and trends, explaining limitations and how data is updated.
- **Clear agendas sent early:** Send town hall/Council meeting agendas in advance (60 to 90 days) with easily identifiable prompts to gather chapter input beforehand.
- **Access:** Offer a virtual attendance option for CLC town halls and other Board touchpoints.
- **Pre-Town Hall:** Before each town hall, develop and provide:
  1. Single-page “chapter-ready update” (three bullets on what changed, three on what’s next, one “ask” of chapters).
  2. Quick-link page (five concrete benefits, three recent “helped a chapter” stories, upcoming dates, and contact information).
  3. Data information on how to request, what’s available, cadence, and caveats.
- **Post-Town Hall:** Following each town hall, distribute:
  1. Micro-polls with no more than three questions within 48 hours after meetings to capture chapter priorities and input.

## Additional Input

- **Segmented breakouts:** Consider using small/medium/large chapter tracks (plus topical tracks like membership, programs, partners) for meeting breakouts.
- **Value Messaging Kit:** Provide short email copy, five talking points, three stories, and a member-facing slide. Vary by audience and chapter size.
- **Demographics:** By career stage, firm type, and affiliation. Explain the voluntary nature and the data validation. Set expectations for broader sharing.
- **Chapter segmentation guidance:** Develop and provide templates and playbooks tuned to small, medium, and large chapters.
- **Channel confusion:** Select one home for Council communications and clearly sunset or de-emphasize others.
- **Volunteer burnout:** Keep requests short, predictable, and useful. Honor time by returning visible outcomes.

The ACEC has worked diligently this year to clarify the Council's purpose and address pressing issues that have hindered its effectiveness and engagement. We are pleased the Board has approved the recommended communication plan and is equally committed to making the Council, and its connection to the Association, as strong as possible. With your support and participation, we can achieve greater alignment at all levels in FPA while positioning the Council as one of the more consequential communications initiatives in FPA’s history.

The Council’s next scheduled meeting is Thursday, November 20, at 4:00 p.m. ET. We continue to invite the Board to suggest topics and issues where input from the Council would be informative to the Board’s strategic discussions and deliberations.

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