Twenty-Three Individuals Complete Inaugural NAPFA DEI Training & Certificate Program

CHICAGO, IL – May 19, 2022 - The National Association of Personal Financial Advisors (NAPFA) is thrilled to recognize the twenty-three individuals who completed NAPFA's DEI Training and Certificate Program this spring.

The NAPFA DEI Training and Certificate program aims to provide NAPFA members and other financial advisors resources and education around four specific DEI topics: culture, hiring practices, people, and inclusion. The program was designed by financial advisors for financial advisors; specifically, it was curated by NAPFA's Diversity, Equity, & Inclusion Committee. It was created for participants to have a deeper understanding of how they can contribute to growing diversity, equity, and inclusion in the financial planning profession.

The inaugural program began in April with four on-demand modules, led by DEI experts. Dr. Miranda Reiter Ph.D., CFP® led the module on culture; Dr. Kimberly Watkins, Ph.D. led the module on hiring practices; Dr. James Pogue, Ph.D. led the module on people; and Luis F. Rosa, CFP® EA led the module on inclusion. Participants completed the modules prior to attending an in-person workshop led by Dr. James Pogue, Ph.D. on May 4, 2022, in Atlanta, Ga. The workshop was facilitated by DEI Committee co-chairs John Eing, CFP® and Mindy Neira, CFP® and DEI Committee member Bill Hampton.

The twenty-three participants were recognized in Atlanta, Ga. during the Opening Keynote session of the NAPFA Spring 2022 National Conference. Congratulations to the following participants: Michael D. Gibney; Susan M. Green; John Eing; Bill Hampton; Mindy Neira; Alexa N. Kirby; Stephen E. Maggard; Kathy Guo; Steve Doster; Ben Jacobs; Lisa M. Neira; Amber Miller; Eileen M. Stevens; Bradley S. Hilton; Jennifer Li; Danika Waddell; Yvonne Beaudreau; Kyle Evans; Tyler Kraus-Sanders; Al S. Davis; Linda Y. Leitz; Ken J. Weingarten; and Lucas Veldhuis.

Registration for the second NAPFA DEI Training & Certificate Program will be available in the coming months. For questions regarding the program, please contact Nikki Palluzzi, CAE, NAPFA Director of Member Services & Experience, at palluzzin@napfa.org.

About NAPFA

Since 1983, the National Association of Personal Financial Advisors has provided Fee-Only financial advisors across the country with some of the highest standards possible for professional competency, comprehensive financial planning, and Fee-Only compensation. With more than 4,400 members across the country, NAPFA is the leading professional association in the United States dedicated to the advancement of Fee-Only financial planning. Learn more at www.napfa.org.

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