



# What We Heard From Members

How member feedback informed  
the Strategic Plan

# Our Strengths, According to Members

## Information and knowledge

- **Professional education and training** are a **top driver** for maintaining membership
  - Members agree NAPFA helps develop **professional skills/capabilities, resources** needed to maintain professional competence, and **education** needed to gain professional knowledge



## Reputation and Culture

- **Strong culture** frequently cited as reason for satisfaction
- **Prestige of membership** a top reason for remaining a member



## Networking

- Networking/network of peers frequently cited as **reason for member satisfaction**
- Networking opportunities the **top reason for remaining a NAPFA member**
- Networking yielded a **high opportunity score**, an indicator that the service has an opportunity to create value to members

## Local level

- Engagement at the **local level** cited as reason for member satisfaction
- NAPFA's **Find an Advisor Platform** was one of the most important programs to respondents and yielded the greatest opportunity for increasing membership value.

# Top Challenges Shaping the Profession

**These challenges directly influenced strategic priorities.**

*Top 4 selections shown by Firm Size*

	1 employee	2 to 5 employees	6 to 10 employees	11 or more employees
1	Learning and applying new technologies (47%)	Adapting to new/changing regulations (32%)	Recruiting and retaining skilled professionals (50%)	Learning and applying new technologies (43%)
2	Adapting to new/changing regulations (26%)	Learning and applying new technologies (29%)	Adapting to new/changing regulations (36%)	Recruiting and retaining skilled professionals (41%)
3	Running a profitable business (24%)	Managing expansion of my practice (29%)	Learning and applying new technologies (33%)	Mergers, acquisitions, and organic growth (36%)
4	Adapting to changing social/political climate (23%)	Recruiting and retaining skilled professionals (27%)	Managing expansion of my practice (25%)	Productivity strains such as lack of time and resources (30%)

# What Keeps Members Engaged with NAPFA

**Networking is the leading retention driver.**

*Top 7 shown*



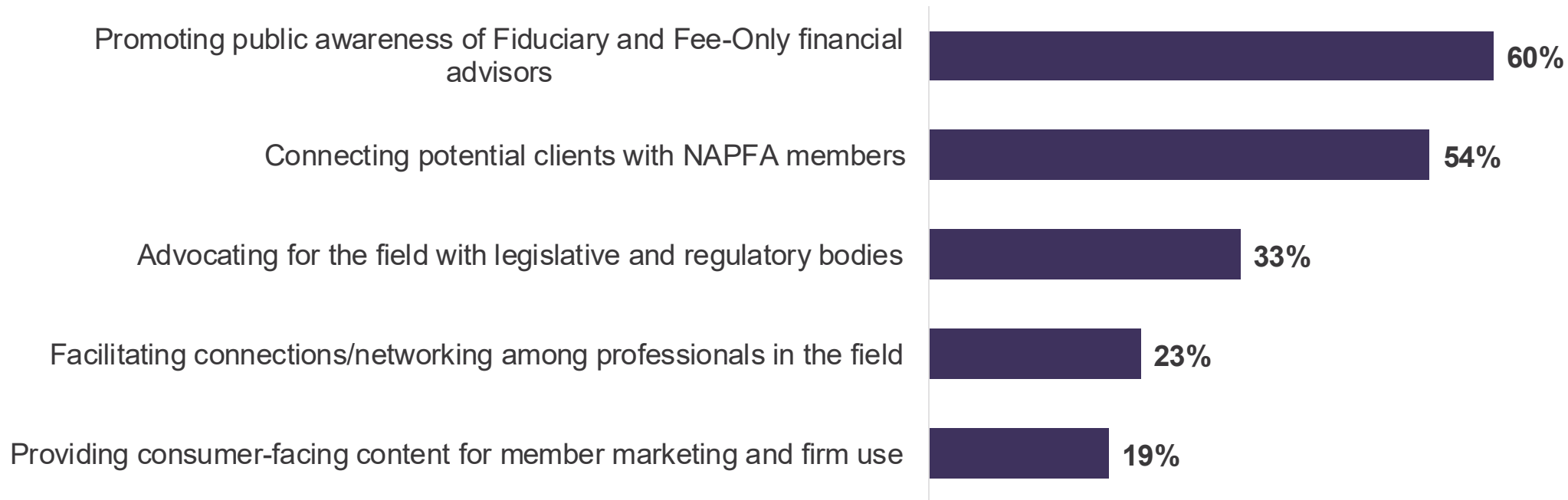
**Other includes:**

- Find An Advisor Profile
- Promoting a fee-only model / network
- Included in XYPN membership

# Member-Identified Priorities for NAPFA

**Top selections from the survey asking members to choose three priorities.**

*Top 5 shown*



Member priorities were considered alongside mission alignment and long-term impact.

# Ideas Raised in Open-Ended Responses

Envision the future of NAPFA beyond the next 3-5 years and its impact on the financial advising field. What initiatives or programs should NAPFA pursue to create transformative value for its members and stakeholders?

*Top 3 initiatives or programs shown*

*Illustrative themes shared by members (not commitments)*

## Consumer Education & Brand Awareness

1

- Launch a national marketing campaign to educate about fee-only fiduciary advisors
- Develop household brand name consumers recognize and seek out
- Create annual consumer survey/media campaign to raise awareness
- Revamp “Find An Advisor” with AI to Improve matching

## Advocacy & Regulatory Influence

2

- Advocate for true fiduciaries
- Foster working groups to analyze federal policy impacts on personal finance

## Professional Development & Education

3

- Create in-depth workshops on advanced planning topics
- Offer specialized masterclasses with templates and resources
- Develop bootcamp training for specific business needs
- Provide high-quality, relevant content

# How Member Feedback Informed the Strategic Plan

- Member feedback highlighted what members value most and where they need greater support
- Findings helped prioritize areas with the strongest alignment between member needs and strategic impact
- The Strategic Plan reflects this alignment while advancing NAPFA's mission

# How Member Feedback Maps to the Strategic Plan

## Elevate the Fiduciary Standard



- ☐ Members prioritized public awareness of fiduciary, Fee-Only advice
- ☐ Prestige and professional credibility drive retention

## Ignite Connections Through Community & Engagement



- ☐ Networking is the leading driver of continued membership
- ☐ Community and local engagement are core strengths

## Deepen Professional Education & Learning



- ☐ Education and training are top drivers of satisfaction
- ☐ Technology and talent development are top challenges