2022 - 2025 Strategic Framework

Mission

We are an engaged community of fee-only, fiduciary financial planners that provides education, professional connections, business development resources, and advocacy – all in support of members’ success.

Vision

As fee-only, fiduciary financial planning professionals, NAPFA members are the public’s trusted advisors of choice because they represent the highest professional and ethical standards.

CORE VALUES

Advocacy
NAPFA members are deeply committed to the Fee-Only model and are advocates for this approach to financial planning.

Client-Centered
NAPFA members commit to a relationship based on the fiduciary standard of care to ensure clients’ needs are always the primary focus.

Community
NAPFA leverages the expertise and perspective of the collective membership to positively impact the financial lives of members’ clients.

Excellence
NAPFA members operate with the highest standards of technical competency and proficiency.

STRATEGIC DRIVERs

Advocacy
Elevate the visibility and impact of Fee-Only financial planning, and the key issues of importance to our members and the clients they serve.

Diversity, Equity, & Inclusion
Champion diversity in the profession, and foster an inclusive and equitable community.

Professional Excellence
Serve as the premier resource for Fee-Only planners seeking to advance their technical, business, behavioral and cultural expertise.

Initiatives

Advocacy
- Strengthen NAPFA’s public policy impact at the federal and state levels.
- Strengthen NAPFA’s consumer awareness by demonstrating the impact of engaging fee-only fiduciary financial planners professionals.
- Increase accessibility of fee-only financial planning resources and services to a broader population.

Diversity, Equity, & Inclusion
- Integrate principles of diversity, equity, and inclusion across the fabric of the organization.
- Diversify NAPFA’s membership and the profession by fostering a welcoming environment for practitioners from underrepresented populations.

Professional Excellence
- Expand the breadth of NAPFA resources dedicated to enhancing business, behavioral, and cultural competencies.
- Provide a dynamic education portfolio that meets the needs of the learners of today and tomorrow.