



2025-2028 STRATEGIC PLAN

ORGANIZATIONAL VALUES

- **Advocacy**
- **Client-Centered**
- **Community**
- **Excellence**

Approved by the NAPFA
National Board of Directors

2025-2028 National NAPFA Strategic Plan





MISSION

We are financial advisors with an unwavering commitment to the Fee-Only, fiduciary standard and our clients' financial well-being.

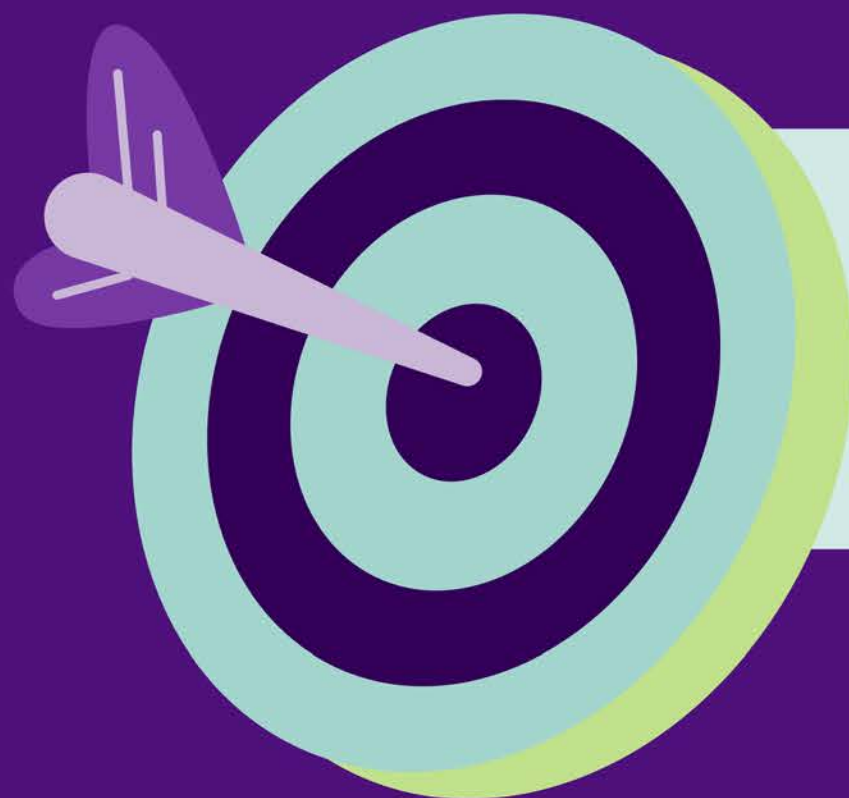




VISION

We are the standard for financial planning and professional excellence, rooted in a commitment to the public good.





STRATEGIC GOALS

- Elevate the Fiduciary Standard
- Ignite Connections Through Community and Engagement
- Deepen Professional Education and Learning





ELEVATE THE FIDUCIARY STANDARD

Position NAPFA as the standard setter in financial planning, strengthening our unique value, and amplifying our visibility and influence.



Set the standard for fiduciary planning that integrates ethics, client-first values and holistic planning.

Engage and influence in advocacy efforts that reinforce fiduciary-first practices and prioritizes consumer interests

Build consumer awareness by developing and implementing an impactful communication strategy that highlights the integrity and expertise of working with a fiduciary advisor



IGNITE CONNECTIONS THROUGH COMMUNITY & ENGAGEMENT

Cultivate a vibrant, inclusive NAPFA community that inspires meaningful connection, collaboration, and belonging, driving sustained member engagement, professional growth, and positive impact.

- ◆ Reimagine the member experience at every stage of the professional journey
- ◆ Expand accessible, inclusive engagement opportunities that invite connection



DEEPEN PROFESSIONAL EDUCATION AND LEARNING

Establish NAPFA as the premier destination for leading-edge education and lifelong learning that empowers members to lead with integrity, adapt to change, and thrive.



Redesign NAPFA's educational experience to prioritize advanced, technical learning centered on holistic, client-first financial planning

Optimize and diversify the learning portfolio to better serve professionals in intermediate and advanced career stages, across various firm types, and within the broader fiduciary planning ecosystem

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