

Student Financial Planning Competition

Real-world cases. Real plans. Real feedback from Fee-Only advisors.

THE PRIZE

Registration and travel to the NAPFA 2027 National Conference

May 5-8, 2027 in San Diego, CA

Do the real work of a financial planner before you graduate. Work through a realistic case study, build a comprehensive plan, and present your recommendations on video. Experienced NAPFA members judge every submission and mentor the finalists one-on-one.

How it works

Fall 2026	Sign up for updates
Early January	Case study released
Late February	Initial video due
Early March	Finalists paired with a NAPFA mentor
Early April	Final video due
Mid-April	Winners announced

Who can enter

- Students in CFP Board Registered Programs nationwide
- Program graduates studying for the CFP® exam
- Teams of one or two

What you submit

A 10 to 20 minute video presenting your plan, as if you were meeting with the client. No written plan required.



Scan to learn more and sign up

napfa.org/student-fp-competition

Questions? membership@napfa.org