



Call for Applications: Serve on the NAPFA Board of Directors

APPLY TODAY

NAPFA thrives because of the dedication, leadership, and vision of its volunteers. The NAPFA Board of Directors plays a vital role in governing the association, setting strategic priorities, overseeing financial stewardship, and helping shape the future of both the organization and the profession of comprehensive, Fee-Only fiduciary financial planning.

Serving on the NAPFA Board of Directors is a meaningful opportunity to contribute at a strategic level while also investing in your own professional growth. Board service allows you to apply your experience, perspective, and leadership skills in collaboration with peers who share a deep commitment to fiduciary excellence and member service.

Past Board members often describe Board service as both rewarding and transformative, citing benefits such as:

- Deepening engagement with NAPFA and the broader profession
- Strengthening leadership and governance skills
- Exchanging ideas with fellow Fee-Only fiduciary financial planners
- Building lasting personal and professional relationships

Who Should Apply

NAPFA's Leadership Development Committee (LDC) is seeking engaged professionals with leadership experience and a commitment to comprehensive, Fee-Only fiduciary financial planning to serve on the NAPFA Board of Directors.

Ideal candidates bring a governance mindset, strategic perspective, and the ability to contribute thoughtfully to complex organizational and financial decisions.

NAPFA values a Board composed of individuals with diverse professional experiences, perspectives, and areas of expertise that strengthen decision-making and effective governance.

Candidates may demonstrate readiness for Board service through prior leadership within NAPFA or through comparable governance experience with other nonprofit, professional, or financial organizations.

Eligibility Requirements

To serve on the Board, candidates must:

- Be a NAPFA-Registered Financial Advisor in good standing
- Have prior leadership experience with NAPFA, such as service on a task force, committee, or Region Board, or comparable leadership or board experience with another nonprofit, professional, or financial organization
- Be willing to step down from any current NAPFA Region Board position if selected

Service Expectations

Board Directors are expected to:

- Serve a three-year term
- Attend the Spring and Fall National Conferences each year of the term
- Participate fully in Board meetings and conference calls throughout the term
- Actively engage in collaborative, strategic discussions and exercise independent judgment in support of the organization's long-term success

If you are ready to make an impact and contribute to the long-term success of NAPFA, we encourage you to review the Board of Directors Nomination and Application Packet and submit an online application by **February 13, 2026**.

Invitation to Nominate

Know a NAPFA member who would make an excellent Board candidate? Member nominations are encouraged and play a key role in identifying future leaders.

Please email ldc@napfa.org with the nominee's name, contact information, and a brief explanation of why they would be a strong addition to NAPFA's volunteer leadership.

Application Deadline: February 13, 2026

Benefits of Serving on the NAPFA Board of Directors

In appreciation of their service, Board members receive:

- Complimentary registration to NAPFA national conferences during their term
- Access to Board development and volunteer leadership training
- Opportunities to connect with leaders across NAPFA and the broader financial planning profession

Roles and Responsibilities of the Board

As part of a governing Board, Directors are expected to:

- Represent members' interests and take ultimate responsibility for the organization's success and long-term direction
- Participate in and approve the strategic plan
- Approve the annual budget
- Focus on policy, strategy, and fiduciary oversight rather than operational matters
- Attend required in-person and virtual Board meetings
- Bring relevant governance, financial, and leadership experience to inform Board deliberations and decision-making

Frequently Asked Questions

How many Board positions are available?

The number of Board vacancies varies each year. The Board includes a Chair, Chair-Elect, Immediate Past Chair, Secretary-Treasurer, Consumer Representative, Academic Representative, and several at-large Directors.

What qualifications are required?

Candidates must be NAPFA-Registered Financial Advisors in good standing. Prior leadership experience within NAPFA is valued; however, comparable nonprofit or organizational board or committee experience is equally acceptable and may bring important external perspective to the Board's work.

What is the time commitment?

Board members serve a three-year term beginning September 1 and ending August 31 three years later. Time commitments vary based on committee assignments, but generally include:

- Up to three in-person Board meetings annually, aligned with leadership meetings and national conferences
- Attendance at the Spring and Fall National Conferences
- Monthly, hour-long video conference meetings

What does the application process involve?

All candidates complete a written application and participate in a formal video interview with the Leadership Development Committee. The application includes both short-answer questions and open-ended questions, such as sharing your vision for NAPFA.

How are Board members selected?

Each year, the Board identifies the skills, experiences, and perspectives most needed for effective governance, including strategic leadership, financial oversight, and organizational insight. The Leadership Development Committee conducts a comprehensive, criteria-based search and recommends a slate of candidates for Board consideration.

What is the application and selection timeline?

Applications close February 13, 2026, video interviews are conducted in late March, and the slate of 2026-2029 Directors is presented for approval in early May, with terms beginning September 1.

TIME FRAME	PROCESS
DECEMBER - MID-FEBRUARY	Applications and nominations accepted
MID-FEBRUARY - EARLY MARCH	Applications reviewed; eligibility, conflict-of-interest disclosures, background evaluations, and reference checks conducted
MID- TO LATE MARCH	Video interviews with selected nominees conducted by the Leadership Development Committee
LATE MARCH	Leadership Development Committee deliberates and finalizes the proposed slate of candidates
LATE APRIL	Slate of candidates presented to the Board of Directors for review and approval