



**NAPFA**  
FOUNDATION

**ANNUAL REPORT**

2025

# Thank you for Reading the NAPFA Foundation's Annual Report!

It has been a meaningful and productive year for the NAPFA Foundation as we continue strengthening our mission of expanding access to fee-only financial planning. Thanks to the generous support of our donors, partners, volunteers, and team, we have been able to increase our programmatic impact, broaden the reach of our initiatives, and strengthen our bonds to aligned organizations across the profession.

We spent much of the year securing and deepening critical partnerships. Building Homes for Heroes is an organization that provides mortgage-free homes to wounded veterans and exclusively partners with NAPFA to provide these veterans with pro bono advice. They continue to be an incredible partner of the foundation, and this year, their generous additional support enabled us to hire a new team member, Jenna Hooks. Jenna worked alongside our industrious programs committee to improve our longest-running program, serve more veterans, and engage new NAPFA member volunteers. NAPFA members have given their time and talent to over 200 veterans already, and we now have capacity to help many more.

The College Affordability Project is also making strides, thanks in large part to the support and collaboration of industry allies. We teamed up with The American Institute of Certified College Financial Consultants (AICCCFC) to provide free college planning certifications to 20 of our volunteers, enhancing the skills they use with pro bono families and clients alike. We offer top-tier tools from College Aid Pro, so volunteers can offer critical insight into the factors that minimize the out-of-pocket cost of college. And this year, we were thrilled to identify our newest collaborator on this program, Pathways Planning and Insights.

Pathways is a non-profit that provides a suite of college planning tools and education seminars to sponsored schools. Once a school is sponsored, they gain access to these resources and now these families are being encouraged to take the additional step of scheduling a one-on-one pro bono session with a NAPFA planner. Families can work with our volunteers to determine the most cost-effective education strategy for their student, which deepens the benefits of what Pathways can offer their students, while also connecting our volunteers directly with the families who most need our help. This partnership also opens up a new avenue for our donors to support this program, by sponsoring a specific school or even an entire school district so they gain access to these critical resources.

As we look ahead, we are focused on putting donations to work for the benefit of the young people we aim to serve. Over the last several years, we have consistently and significantly increased the amount of our budget dedicated to programming for young veterans, aspiring college students, and future financial planners. We have grown our programs, increased the number of scholarship opportunities, and are actively working to increase our presence on university campuses with financial planning programs.

We remain inspired by the growing momentum around pro bono engagement within the financial planning community. The NAPFA Foundation will continue to foster leadership, collaboration, and innovation—empowering advisors, supporting students and emerging professionals, and ensuring that families and individuals nationwide have access to the financial guidance they deserve.

We invite you to stay engaged with us in the coming year by volunteering, contributing, sharing our programs with your networks, and joining us in advancing our mission. Together, we can continue opening doors, creating opportunities, and changing lives through the power of financial planning.



Danielle Seurkamp  
President  
NAPFA Foundation

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**NEW**

# PROGRAM ENHANCEMENTS

Because of our supporters, the NAPFA Foundation Board of Trustees implemented numerous investments to our programs, initiatives, scholarships, and overall impact in 2025. Here are a few ways we increased our impact:

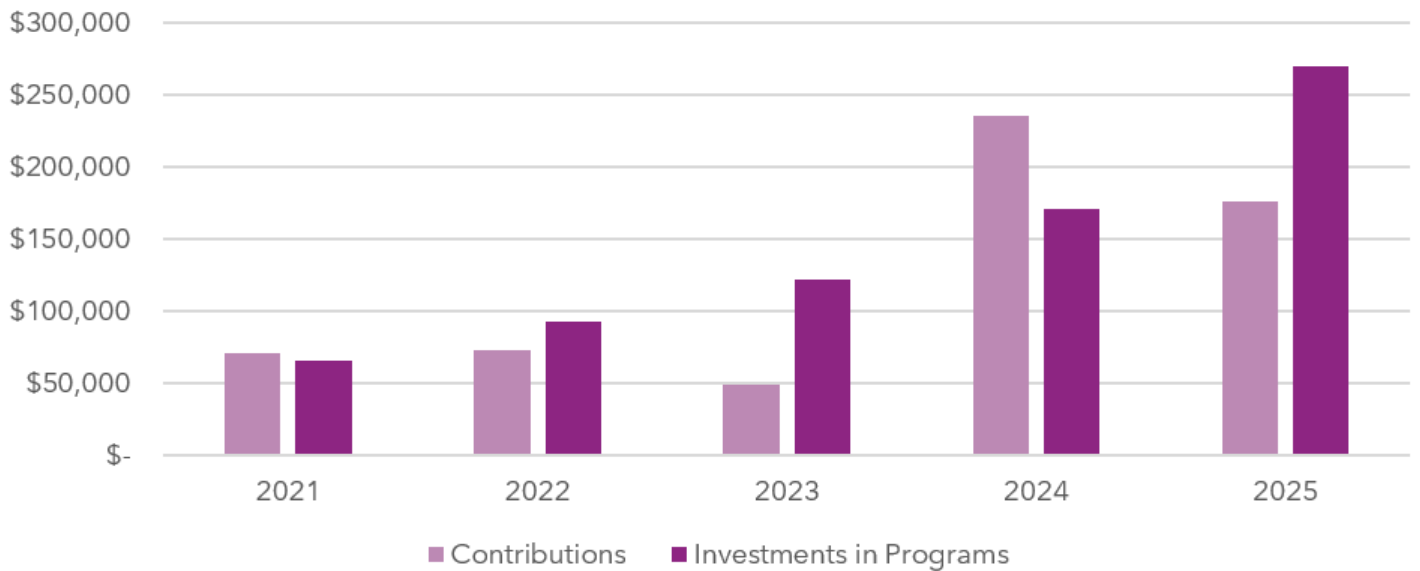
**CCFC Certifications for NAPFA Members**

**New Scholarships**

**Funding for financial planning university programs providing pro bono planning**

**Dedicated staff member for Building Homes for Heroes program**

## Investing More Than Ever Before More Support = More Impact



# SUPPORTERS



**\$168,702**

Total from 163 Individual Donations



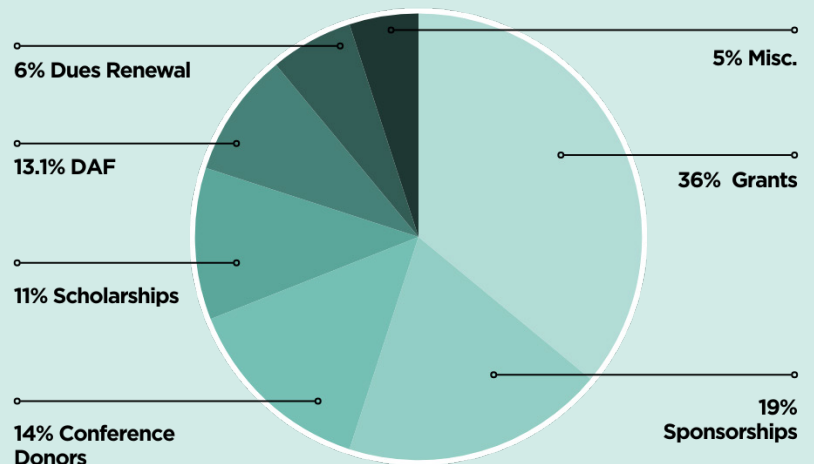
**\$70,000**

Total in Grant Support

Thank you to every generous supporter and grant partner of the NAPFA Foundation.

The NAPFA Foundation board is focused on high transparency so NAPFA members, supporters, and volunteers are informed about how the foundation spends its resources to make an impact. Being a smaller foundation and with the support of NAPFA, we are able to direct more of our investments toward impact, and we strive to increase the impact as our support increases. Take a look at how we are enhancing our impact through strategic spending and how the support we receive encourages further investments.

## How We Received Support in 2025



## Grant Partners



## Sponsors



NEW

# SCHOLARSHIPS

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One of the best ways we can provide impact is through the foundation's strategic investments in the next generation of financial planners. This year, we invested more than ever before in scholarships and added two new scholarships directly focused on assisting new financial planners to join the profession and provide help to those who need it most.

## Keener Financial Planning Scholarship

The Keener Financial Planning Scholarship was established to support individuals who demonstrate both high merit and financial need as they begin a career in financial planning. Through this scholarship, Keener Financial Planning is investing in the next generation of professionals who are committed to excellence, integrity, and service within the profession. Up to two awards will be presented per year and they will help reduce financial barriers to education and certification. The scholarship will empower promising students to pursue meaningful careers and contribute positively to the future of financial planning.

**Award amount per recipient: \$2,500.**

## NAPFA Foundation Memorial Scholarship

For more than forty years, NAPFA has provided thousands of members opportunity, friendships, business assistance, and life-long connections which serves as the bedrock of a fruitful community. However, too often, we have to say goodbye to members forever and many members wish to make an impact in their memory. The NAPFA Foundation Memorial Scholarship was established through the generous donations of NAPFA members who wished to honor the lives and legacies of colleagues and fellow members who have passed away. These gifts create a lasting tribute by transforming remembrance into opportunity— supporting students who aspire to build careers in financial planning and uphold the values of the profession. By giving in memory of those who made an impact on NAPFA and the financial planning community, donors help ensure that their commitment to integrity, service, and education lives on through the next generation of financial planners.

**Award amount per recipient: \$2,500.**

NEW

# SCHOLARSHIP RECIPIENTS

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**Tianner Barnett**

Diahann W. Lassus Scholarship



**Brandon Perry**

Diahann W. Lassus Scholarship



**Melody Royer**

Diahann W. Lassus Scholarship



**Sonika Chan**

Diahann W. Lassus Scholarship



**Mitzie Metz**

Diahann W. Lassus Scholarship



**Daniel Majd**

Diahann W. Lassus Scholarship



**Christine Osterwalder**

Diahann W. Lassus Scholarship



**Beth Koonce**

Gail Parker Scholarship

# NAPFA Foundation Pro-Bono Service Award

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The NAPFA Foundation's Pro-Bono Service Award recognizes the community service work of NAPFA members who have contributed their time and financial planning expertise pro-bono to helping those in need in order to achieve positive financial outcomes in the future. This award is presented to a financial advisor or financial planning firm in recognition of their significant pro-bono contributions to a nonprofit organization, social services agency or directly to individuals through their own firm.

## 2025 Award Recipient

**Steve O. Oniya, CFP®, ChFC®, MBA**



Born and raised in Houston, Texas and instilled with an entrepreneurial drive from entrepreneurial parents; Steve enjoys leading people, business development and helping others. He enjoys the strategy of making more, from less.

Steve grew up helping his father's business (in which his father was featured in Forbes). He enjoys learning from others, adapting to different environments, strategy, and helping instill confidence in others to achieve their goals.

Steve personally enjoys achieving goals and self-development. Steve has won numerous awards, higher-level education, and extracurricular activities that further developed his financial management and people skills. Some of those awards and achievements include 1st place winner in the Foundations Stock portfolio competition (return of 61% vs. competition mean of 21%), National Excellence in Leadership Award & Presidential status from the National Society of Leadership & Success, the Bill & Sharon Young Media Education Scholarship and most dedicated alumni from Alpha Kappa Psi ( the largest business fraternity). A cosmopolitan traveler and philomath, Steve O. or Steven (as some affectionately call him), has been fortunate to travel throughout the world, and enjoys learning about culture, meeting new people, and developing relationships. He also enjoys the strategizing of travel planning to achieve finite goals of places and experiences with limited time and resources in an efficient manner. Steve also enjoys gardening and how it is akin to investing with the phrases like "you reap what you sow" and "the fruit of your labor."



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# SUPPORTERS

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