

For Immediate Release: August 18, 2020
Contact: Angela Armijo
ArmijoA@napfa.org
847-483-5400, X124

Karla McAvoy, CFP® Elected 2020 NAPFA Board Chair-Elect

Chicago, IL – The National Association of Personal Financial Advisors (NAPFA) Board of Directors announced Karla McAvoy, CFP®, MBA as its 2021 Chair-elect.

Karla is a senior financial advisor and principal at HC Financial Advisors, a registered investment advisory firm based in Lafayette, CA. In this role, she provides comprehensive financial planning for her clients and works with her business partners to manage the firm and its employees.

Current Board Chair, Dave O'Brien "was thrilled when Karla McAvoy was chosen to be NAPFA's Chair-elect. I have worked with Karla as a NAPFA volunteer for years and know she represents the heart of NAPFA. As a second-generation owner of a firm with deep roots in NAPFA, Karla has our values in her DNA. She is a thoughtful planner, skilled business owner and long-time volunteer to our profession. Karla's experience and vision will assure we continue our journey as the leading association for Fee-Only advisors."

Even though her degree is in economics, Karla actually started her working life in software development. However, in the process of learning to manage her own growing family's finances, she felt drawn to return to school and become a CERTIFIED FINANCIAL PLANNER™ professional. As Karla transitioned to her financial planning career, she was introduced to a San Francisco Bay Area NAPFA study group. "I so enjoyed the group I knew I had found my people". Karla started volunteering for the study group and that soon evolved to a spot on the West Region Board, various committees, and then service on the NAPFA Board. "My career would definitely not be the same without NAPFA. I have volunteered a lot of time but have received far more than I have given".

As Chair-elect, Karla looks forward to strengthening NAPFA's role as the preferred community for fee-only, fiduciary financial planners. "We have an amazing history of having changed this profession for the better. We will continue to find ways to expand the membership to better reflect our country's population and to serve communities that have not had easy access to our services. As a professional membership organization, we will also continue to look for ways to help members be successful through education, community, and tools for their businesses."

The Board of Directors elected McAvoy to the new role at its July 2020 meeting. Current Chair-elect Lydia Sheckels, CFP® will serve as Chair of the Board of Directors in 2020, and McAvoy will become Chair of the Board in 2021.

About NAPFA

Since 1983, The National Association of Personal Financial Advisors has provided Fee-Only financial planners across the country with some of the highest standards possible for professional competency, comprehensive financial planning, and Fee-Only compensation. With more than 3,900 members across the country, NAPFA is the leading professional association in the United States dedicated to the advancement of Fee-Only financial planning. Learn more at www.napfa.org.

###