FOR IMMEDIATE RELEASE
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NAPFA Announces New National Board and Secretary/Treasurer Appointment

CHICAGO, IL – August 29, 2025— The National Association of Personal Financial Advisors (NAPFA) is pleased to announce the appointment of **Emily Jaffe, CFP®, CDFA®,** and **Evan Loomis, CFP®,** to its National Board of Directors for the 2025–2026 term, as well as the election of **James J. (JJ) Williams, CFP®, MBA,** to the role of Secretary/Treasurer.

About Emily Jaffe, CFP®, CDFA®
Emily Jaffe is the President and Owner of OFC Wealth Management, a Fee-Only firm based in Short Hills, NJ. With over 15 years of experience in capital markets and nearly a decade in financial planning, she specializes in comprehensive planning, investment strategy, retirement planning, estate and generational wealth management, and divorce financial analysis.

A graduate of the Wharton School, Emily began her career in leveraged finance at Citigroup before serving as a Principal at North Sea Partners. She joined OFC Wealth Management in 2016, earned her CFP® designation in 2018, and later added the CDFA® credential to support clients navigating divorce. Emily has served as President of NAPFA's Northeast Mid-Atlantic Regional Board, volunteers with Savvy Ladies, and is a frequent speaker on financial empowerment and divorce.

About Evan Loomis, CFP®
Evan Loomis is a financial planner with Level Financial Advisors, bringing more than a decade of experience in financial planning and a strong dedication to the fiduciary standard. He previously founded Loomis Financial Consulting and has held volunteer leadership roles with NAPFA, including service on the West Region Board.

Evan holds a Master of Science in Financial Planning from Golden Gate University and serves as an adjunct professor in the financial planning program at California Baptist University, where he mentors future professionals. Outside of his practice, he is active in nonprofit work with The Phil Simon Clinic Tanzania Project and brings a team-first perspective shaped by his background as an NCAA soccer player and nationally licensed coach with the US Soccer Federation.

About James J. (JJ) Williams, CFP®, MBA
James (JJ) Williams is the CEO and Founder of Williams Financial, LLC, where he leads a team dedicated to helping clients actively engage in their financial planning. With more than 20 years of experience, JJ's career spans roles in banking, marketing, operations, and compliance before establishing his

independent firm. He also has a strong background in education, having taught business courses at Castleton University, Community College of Vermont, and Southern Vermont College, as well as serving as Department Chair of Entrepreneurship at Hudson Valley Community College (SUNY).

Within NAPFA, JJ has served as a National Board Member, Chair of the Membership Committee, and as a board member for the Northeast Mid-Atlantic Region. His deep professional expertise and dedication to the Fee-Only standard will serve NAPFA well in his new leadership role as Secretary/Treasurer.

Looking Ahead
"Evan, Emily, and JJ bring an incredible blend of experience, leadership, and passion for advancing Fee-Only financial planning," said NAPFA CEO Kathryn Dattomo, CAE. "Their expertise will strengthen NAPFA's ability to support members and elevate the profession."

About NAPFA
Since 1983, the National Association of Personal Financial Advisors has provided Fee-Only financial advisors across the country with some of the highest standards possible for professional competency, comprehensive financial planning, and Fee-Only compensation. With more than 4,500 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.