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NAPFA Unveils Ambitious Strategic Plan to Guide Fiduciary Financial Planning into the Future

CHICAGO, IL - October 15, 2025 — The National Association of Personal Financial Advisors (NAPFA) today announced the launch of its 2025–2028 Strategic Framework, an ambitious plan designed to elevate the fiduciary standard, enhance member engagement, and advance professional education in financial planning.

Guided by extensive member feedback, market research, and consultation with McKinley Advisors, the new plan builds upon NAPFA’s strong foundation as the leading organization for Fee-Only fiduciary advisors.

“Our 2025–2028 Strategic Plan recommits us to what makes NAPFA exceptional--putting clients first, supporting professional growth, and fostering a deeply collaborative community,” said Natalie Pine, CFP®, ChSNC®, NAPFA Board Chair. “It is rooted in our belief that excellence in financial planning must always serve the public good.”

The plan introduces three strategic goals:

- **Elevate the Fiduciary Standard:** Position NAPFA as the premier advocate for client-first, ethical financial planning through advocacy, public awareness, and professional excellence.
- **Ignite Connections Through Community and Engagement:** Cultivate a vibrant, inclusive NAPFA community where professionals at all stages feel connected, supported, and inspired.
- **Deepen Professional Education and Learning:** Establish NAPFA as the top destination for advanced, lifelong learning—empowering members to stay at the forefront of fiduciary practice.

These priorities aim to increase public recognition of fiduciary standards, drive deeper member satisfaction and engagement, and position NAPFA as a high-performing, mission-driven organization.

“NAPFA pioneered the concept of fiduciary advice long before it was mainstream,” said Kathryn Dattomo, CAE, NAPFA CEO. “This plan honors that legacy while preparing us and the profession for a future defined by excellence, equity, and purpose.”

The strategic framework will be implemented across all organizational areas, with embedded commitments to diversity, equity, and inclusion. Progress will be tracked through measurable outcomes aligned with NAPFA’s mission and values.

To learn more about the 2025–2028 Strategic Plan, visit napfa.org/strategic-framework.

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 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.