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

CHICAGO, IL – September 1, 2026— The National Association of Personal Financial Advisors (NAPFA) is pleased to announce the appointment of Danika Waddell, CFP®, RLP®, and Rob Schulz, CFP®, to its National Board of Directors, as well as the election of Evan Loomis, CFP®, as Secretary/Treasurer. Evan will serve in the officer role through December 31, 2027.

About Danika Waddell, CFP®, RLP®

Danika Waddell is a CERTIFIED FINANCIAL PLANNER™ professional and the founder of Xena Financial Planning. She works with women in the technology industry who care deeply about their impact on the world and is passionate about making financial planning more accessible to people who have traditionally felt excluded by the profession.

Danika was recognized as one of Investopedia's Top 100 Financial Advisors in 2022 and 2023. She is a Registered Life Planner and holds a Master of Science in Advanced Financial Planning with a concentration in life planning from Golden Gate University. Her volunteer leadership includes service on NAPFA's West Region Board and Women's Initiative Committee, as well as the FPA of Puget Sound Board of Directors. She also founded Xena Rising, which hosts retreats for women in financial planning, and has been featured in The Wall Street Journal, The New York Times, and Investopedia.

About Rob Schulz, CFP®

Rob Schulz is the founder of Schulz Wealth, which he established in 2014 after the sudden loss of his father—an unprepared business owner—inspired his mission to help other families avoid similar uncertainty. With more than 25 years of experience, Rob serves successful business owners, executives, and families as they navigate complex financial decisions.

A graduate of the University of Texas with a degree in accounting, Rob began his career as a U.S. Navy Surface Warfare Officer aboard the USS John Rodgers. His military service shaped a leadership style grounded in discipline, responsibility, and service.

Rob is the author of Thoughts on Things Financial: Your Guide to a Chaotic Money World and has been recognized as an Investopedia Top 100 Financial Advisor, a Five Star Wealth Manager, and Best Financial Advisor in Arlington & Mansfield by Living Magazine. He has also taught retirement planning at Texas Christian University and the University of Texas at Arlington. Rob and his wife, Shelly, have lived in Mansfield, Texas, since 1994 and have four children.

About Evan Loomis, CFP®

Evan Loomis is a financial planner with Level Financial Advisors and brings more than a decade of financial planning experience and a strong dedication to the fiduciary standard. He previously founded Loomis Financial Consulting and has held several NAPFA volunteer leadership roles, including service on the National Board of Directors and 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.

Looking Ahead

"Danika and Rob bring valuable experience, perspective, and a deep commitment to serving others, while Evan has demonstrated thoughtful leadership throughout his service to NAPFA," said Board Chair Michael D. Gibney, CFP®, CAP®, AIF®. "Their contributions will help NAPFA support its members, strengthen its community, and advance Fee-Only financial planning."
