



CFP BOARD

CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

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CFP Board and NAPFA:

Working Together for the Financial Planning Profession

*Agreement between two organizations strengthens
efforts to raise awareness of CFP® certification*

Washington, D.C. – Certified Financial Planner Board of Standards (CFP Board), and the National Association of Personal Financial Advisors (NAPFA), have agreed to work together to advance the financial planning profession for the benefit of the public's financial well-being.

"We look forward to growing our long-standing relationship with CFP Board and supporting the CFP® mark as the unquestioned standard in the financial planning profession," said NAPFA Board Chair, Scott Beaudin, CFP®. "Working in a cohesive manner strengthens the messages of both organizations, and broadens NAPFA's reach to CFP® professionals, and ultimately to consumers."

This collaboration features a complimentary one-year NAPFA membership for new CFP® professionals. It also extends to the promising role of the [CFP Board Center for Financial Planning](#) in raising awareness of the Center among NAPFA members. NAPFA is poised to encourage members to contribute time, talent and treasure to the Center while CFP Board will encourage new CFP® professionals to explore NAPFA membership, and to take part in NAPFA continuing education, networking programs and events. The organizations will work together in a way that ensures that their efforts are complimentary and support the shared goal of strengthening the profession.

Kevin R. Keller, CFP Board's CEO, said that, "NAPFA has been a collaborative partner as it works with us to increase the relevance of the CFP® mark and the financial planning profession. This agreement strengthens our relationship and our shared responsibility of benefiting the public through financial planning and CFP® certification."

"We see this as a great way to create a winning experience for everyone involved," said NAPFA Chief Executive Officer, Geoffrey Brown. "New CFP® professionals will have expanded access to education and networking opportunities to help launch their careers, while the Center will benefit from increased engagement and support from the many fee-only financial planners who call NAPFA home."

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 3,200 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.

About CFP Board

The mission of Certified Financial Planner Board of Standards, Inc. is to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for competent and ethical personal financial planning. The Board of Directors, in furthering CFP Board's mission, acts on behalf of the public, CFP® professionals and other stakeholders. CFP Board owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, CFP® (with plaque design) and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. CFP Board currently authorizes nearly 80,000 individuals to use these marks in the U.S.

About the CFP Board Center for Financial Planning

The CFP Board Center for Financial Planning seeks to create a more diverse and sustainable financial planning profession so that every American has access to competent and ethical financial planning advice. The Center brings together CFP® professionals, firms, educators, researchers and experts to address profession-wide challenges in the areas of diversity and workforce development, and to build an academic home that offers opportunities for conducting and publishing new research that adds to the financial planning body of knowledge. More about the Center and its initiatives can be found at www.CenterforFinancialPlanning.org.

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