Twenty-Eight Individuals Complete Fall 2023 NAPFA DEI Training & Certificate Program

CHICAGO, IL – September 18, 2023 - The National Association of Personal Financial Advisors (NAPFA) is thrilled to recognize twenty-eight individuals who completed NAPFA's DEI Training and Certificate Program this fall.

The NAPFA DEI Training and Certificate program aims to provide NAPFA members and other financial advisors resources and education around four specific DEI topics: culture, hiring practices, people, and inclusion. The program was designed by financial advisors for financial advisors; specifically, it was curated by NAPFA's Diversity, Equity, & Inclusion Committee. It was created for participants to have a deeper understanding of how they can contribute to growing diversity, equity, and inclusion in the financial planning profession.

The program began with participants reviewing four on-demand modules, led by DEI experts. Dr. Miranda Reiter Ph.D., CFP® led the module on culture; Dr. Kimberly Watkins, Ph.D. led the module on hiring practices; Dr. James Pogue, Ph.D. led the module on people; and Luis F. Rosa, CFP® EA led the module on inclusion. Participants completed the modules prior to attending a workshop facilitated by DEI Committee Co-Chair Mindy Neira, CFP®, ChSNC® and committee members Bill Hampton, AFSP, CFEI, RFC® and Michelle Wilson, AIF®, CSRIC®.

Congratulations to the following individuals, who are part of the largest cohort to complete the program: Chris Alman, Ann Arceo, Trenton Arnone, Brie Black, Jacob Burleson, Tyler Chapman, Nicole Cilley, Liz Damaso Kishel, Rebekah Eason, Cecilia Fleming, Laird Green, Jana Gregorek, Ben Henry-Moreland, Kelli Hinton, Eric Hutchens, William Jeter, Jean Keener, Kathryn Kubiak-Rizzone, Grant Maddox, Marc McQueen, Annie McQuilken, Stefany Quirico, Nicole Renaux, Laurie Vitali, Katrina Welker, Lauren Zangardi Haynes, Elizabeth Zemak, and Ziying Zhou.

Registration for the next NAPFA DEI Training & Certificate Program is now available. The program will take place in Minnetonka, Minn. And is hosted by the FPA Minnesota Chapter on October 11. For questions and details regarding the program, please contact Nikki Palluzzi, CAE, NAPFA's Senior Director of Member Services & Experience, at palluzzin@napfa.org.

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 4,600 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.

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