Fifteen Individuals Complete Spring 2023 NAPFA DEI Training & Certificate Program

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

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 John Eing, CFP® and DEI Committee members Bill Hampton, AFSP, CFEI, RFC®, and Daria Victorov, CFP®.

Congratulations to the following spring program participants: Kristy Archuleta, Anne Marie Ashworth, Rachel Ballengee, Sunit Bhalla, Kelsey Brennan, Nycole Freer, Wendy Hartman, Hayley Haslett, Cheryl Holland, Emily Jaffe, Jeff Jones, Natalie Pine, Roain Saunders, Jason Schmitt, and Jonathan Wong.

Registration for the next NAPFA DEI Training & Certificate Program will be available in the coming months. For questions 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 4,500 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.

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