



# 2022 - 2025 Strategic Framework

## Mission

We are an engaged community of fee-only, fiduciary financial planners that provides education, professional connections, business development resources, and advocacy – all in support of members’ success.

## Vision

As fee-only, fiduciary financial planning professionals, NAPFA members are the public’s trusted advisors of choice because they represent the highest professional and ethical standards.

## CORE VALUES

### Advocacy

NAPFA members are deeply committed to the Fee-Only model and are advocates for this approach to financial planning.

### Client-Centered

NAPFA members commit to a relationship based on the fiduciary standard of care to ensure clients’ needs are always the primary focus.

### Community

NAPFA leverages the expertise and perspective of the collective membership to positively impact the financial lives of members’ clients.

### Excellence

NAPFA members operate with the highest standards of technical competency and proficiency.

## STRATEGIC DRIVERS

### Advocacy

Elevate the visibility and impact of Fee-Only financial planning, and the key issues of importance to our members and the clients they serve.

### Diversity, Equity, & Inclusion

Champion diversity in the profession, and foster an inclusive and equitable community.

### Professional Excellence

Serve as the premier resource for Fee-Only planners seeking to advance their technical, business, behavioral and cultural expertise.

#### Initiatives

- Strengthen NAPFA’s public policy impact at the federal and state levels.
- Strengthen NAPFA’s consumer awareness by demonstrating the impact of engaging fee-only fiduciary financial planning professionals.
- Increase accessibility of fee-only financial planning resources and services to a broader population.

#### Initiatives

- Integrate principles of diversity, equity, and inclusion across the fabric of the organization.
- Diversify NAPFA’s membership and the profession by fostering a welcoming environment for practitioners from underrepresented populations.

#### Initiatives

- Expand the breadth of NAPFA resources dedicated to enhancing business, behavioral, and cultural competencies.
- Provide a dynamic education portfolio that meets the needs of the learners of today and tomorrow.