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NAPFA Announces 2024 Award Recipients

Chicago, IL — The National Association of Personal Financial Advisors (NAPFA) is thrilled to honor a distinguished group of professionals and firms with its prestigious 2024 awards. These individuals and organizations exemplify the standards of excellence and commitment that NAPFA promotes in the field of Fee-Only financial planning.

Award Recipients:

- **Janet Briaud, CFP®** has been awarded the **Robert J. Underwood Distinguished Service Award**, recognizing her exceptional long-term service to NAPFA and significant contributions to the advancement of Fee-Only financial planning, particularly through her active participation and leadership in various committees.
- **Sunit Bhalla, CFP®** has received the **Inspiring Leader Award** for his outstanding role in mentoring and encouraging fellow professionals, thereby enhancing their capabilities, and inspiring them to reach their full professional potential within NAPFA.
- **Franklin Gay, CFP®, EA** has been awarded the **New Professional Award**. As a standout young practitioner, Franklin has made significant contributions to his firm and the profession, demonstrating innovative approaches and a commitment to advancing financial planning.
- **Nikki Palluzzi, CAE** has received the **Special Achievement Award** for her extensive contributions to the profession and her role in educating consumers about the benefits of comprehensive financial planning and working with a qualified financial advisor.
- **Xena Financial Planning** has been awarded the **Excellence in DEI Award – Solo Firm** for its dedicated efforts to promote diversity, equity, and inclusion within their operations and the broader community.
- **Ballast Point Financial Planning** has been awarded the **Excellence in DEI Award – Mid-Sized Firm**, awarded for their effective initiatives in fostering an inclusive environment that values diversity at every level of their organization.
- **Tobias Financial Advisors** has been awarded the **Excellence in DEI Award – Large Firm** for their substantial and effective DEI initiatives, significantly enhancing inclusivity within the firm and setting a benchmark in the industry.



- **Lisa Neira, CFP®** has earned the **NAPFA Foundation Pro Bono Service Award** for her exceptional volunteer work and provision of pro bono financial planning services, demonstrating a profound impact on the community and setting a high standard for civic engagement.

About the Awards:

Each awardee has been carefully selected by NAPFA's Awards & Recognition Committee, which evaluates nominees based on their contributions to the association, the profession, and the public. These contributions, whether through service, leadership, educational efforts, or community involvement, must have a lasting and positive impact.

Presentation of Awards:

The awards will be presented at one of the National Conferences, celebrating the achievements of these outstanding professionals. Each recipient exemplifies the commitment to professional excellence and ethical practices that NAPFA stands for.

About NAPFA:

Since 1983, The National Association of Personal Financial Advisors has been the leading professional association dedicated to promoting Fee-Only financial planning. NAPFA's members adhere to the highest standards of professional competency, comprehensive financial planning, and Fee-Only compensation. With over 4,500 members across the country, NAPFA continues to advocate for personal financial planning best practices and the value of professional, fiduciary advice.

Learn more about our award winners and the NAPFA standards at www.napfa.org/awards.

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For further information or to arrange interviews with the award recipients, please contact Spencer Bone at the details provided above.