



Call for Applications: Serve on the NAPFA Board of Directors

NAPFA thrives through the dedication and vision of its volunteer leaders. The Board of Directors plays a critical role in governing the association, setting its strategic direction, overseeing finances, and shaping the future of the organization and the profession.

Serving on the NAPFA Board of Directors offers far-reaching benefits — not only for the organization but also for your personal and professional growth. By contributing your skills, expertise, and vision, you will help guide NAPFA's mission while gaining invaluable experience collaborating with others who share your passion.

Past Board members frequently highlight the many rewards of board service including:

- Enhancing your career and deepening your engagement with NAPFA;
- Developing and expanding your leadership skills;
- Exchanging ideas and insights with fellow financial planners; and
- Growing your network of personal and professional contacts.

NAPFA's Leadership Development Committee (LDC) is seeking enthusiastic professionals with leadership experience and a commitment to comprehensive, Fee-Only financial planning to serve on NAPFA's Board of Directors. If you are ready to make an impact and advance your professional involvement, please review the information in this NAPFA Board of Directors Nomination and Application Packet and submit your online application by [February 3, 2025](#).

APPLY TODAY

Invitation to Nominate: If you know of a NAPFA member who would make an excellent candidate, please email ldc@napfa.org with the nominee's name, contact information, and a brief explanation of why they would be a valuable addition to NAPFA's volunteer leadership.

Application Deadline: February 3, 2025

Benefits of Serving on the NAPFA Board of Directors

In appreciation of their service, Board members receive:

- Complimentary registration to NAPFA national conferences during their term
- Exclusive access to Board development and volunteer training sessions
- Unique networking opportunities with key leaders in the association and profession

Requirements to Serve on the NAPFA Board of Directors

To serve on the Board, candidates must meet the following requirements:

- Be a NAPFA-Registered Financial Advisor in good standing;
- Have prior experience on a NAPFA task force, committee, Region Board, or comparable nonprofit organization (e.g., FPA, AICPA, etc.); and
- Be willing to step down from any current position on a NAPFA Region Board if selected to serve on the board.

NAPFA Board Directors are required to:

- Serve a three-year term;
- Attend the Spring and Fall National Conferences each term year; and
- Participate in all Board meetings and conference calls

NAPFA Board of Directors Roles and Responsibilities

- Understand the organization’s mission, goals, policies, programs, services, and its strengths and needs.
- Represent members’ interests and take ultimate responsibility for the organization’ s success and long-term direction.
- Participate in and approve the strategic plan.
- Approve the annual budget.
- Represent the organization’s viewpoint and focus on policy and strategic level issues.
- Be prepared for and attend three face-to-face Board meetings and monthly video conferences.

Frequently Asked Questions

How many Board positions are available?
NAPFA’s Board of Directors will communicate with the NAPFA Leadership Development Committee as to the number of expected Board vacancies each year. The Board includes a Chair, a Chair-elect, an Immediate Past Chair, a Consumer Representative, a Secretary-Treasurer, and other “at-large” directors.

What are the candidate requirements?
Candidates must be a NAPFA-Registered Financial Advisor in good standing. Experience on a NAPFA task force, committee, Region Board, or combination thereof is preferred. Comparable experience with another non-profit organization is also acceptable.

What is the time commitment?
Board Members serve a three-year term, starting on September 1 and ending on August 31 three years later. The time commitment varies depending on the tasks or committee assignments you take on.

Each year, Board members participate in the summer volunteer leaders’ meetings at NAPFA headquarters, as well as the Fall and Spring Conferences. The Board holds three in-person meetings annually, aligned with these events, and conducts monthly hour-long video conferences.

What are the application requirements?
All candidates must complete the application and participate in a formal video interview with NAPFA’s Leadership Development Committee. The application will include questions that require simple answers, such as your ability to meet the commitments of being a Board member, as well as open-ended questions, such as “what is your vision for the organization?”

How are members of the Board selected?
NAPFA’s Board of Directors communicates the particular sets of skills that the Board is seeking in candidates to NAPFA’s Leadership Development Committee each year. The LDC then conducts an exhaustive search and recommends a slate of candidates for Board service.

What is the application and selection timeline?

Time Frame	Process
December to January	Applications and nominations accepted
February to March	Applications reviewed, reference and background checks performed
March to April	Video interviews with selected nominees conducted by the Leadership Development Committee
April	Slate of candidates recommended by the Leadership Development Committee and presented to the Board for their approval
May	The Board approves the slate of candidates