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New Tools from NAPFA Advance Workplace Diversity, Equity & Inclusion

Chicago, IL – The National Association of Personal Financial Advisors (NAPFA) announces new resources and tools to help members navigate Diversity, Equity & Inclusion (D, E & I) issues in the workplace.

An integral part of NAPFA's mission has always been to be a beacon for diversity within the financial planning profession though building and strengthening relationships between financial planning professionals and the diverse populations they serve.

"Our vision is to be the standard bearer for diverse advisors by offering member resources that advance D, E & I and helps cultivate a community where diverse perspectives and backgrounds are valued. While there seems to be plenty of awareness around diversity and inclusion, the struggle for most organizations is making it a part of everyday experiences. These new resources are designed to help planners discuss relevant issues and pursue the opportunities D E & I initiatives present", says Geof Brown, NAPFA CEO.

As the stewards of the association's D, E & I efforts, NAPFA's Diversity & Inclusion Steering Committee sponsors conference scholarships, helps to defray the costs of CFP® exams and review materials, curates content for virtual learning and in-person educational events, and convenes effective conversations with NAPFA members around diversity, equity, inclusion, and racial inequality. The committee met with NAPFA firms in several listening sessions to understand the obstacles and challenges they experienced with D, E & I.

As a result of those listening sessions, the Committee developed a D + I Toolkit. This resource will help NAPFA members and their firms navigate issues and conversations in the D, E & I space. While dialogue and education are crucial steps to improving understanding, it's clear that without action, true progress cannot be achieved. The toolkit includes both a written guide and a series of short videos designed to help NAPFA members take action in the workplace.

The D + I Toolkit addresses four key components:

- **Culture** – How to create a culture this is inclusive and welcoming
- **People** – Ways to be an advocate for marginalized groups
- **Inclusion** – Actions that promote inclusion in firms
- **Hiring Practices** – How to craft and deploy an equitable hiring system

D, E & I can be challenging, and many organizations continue to strive to turn dialogue and intentions into actions. The NAPFA D + I Toolkit helps users navigate challenges and take action to help create a workplace where people of different backgrounds can succeed, and diverse, mission-advancing perspectives can be heard.

About NAPFA

Since 1983, The National Association of Personal Financial Advisors has provided Fee-Only financial planners across the country with some of the highest standards possible for professional competency, comprehensive financial planning, and Fee-Only compensation. With more than 4,000 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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