New Individuals Complete Summer 2024 NAPFA DEI Training & Certificate Program

CHICAGO, IL – July 25, 2024 - The National Association of Personal Financial Advisors (NAPFA) is thrilled to recognize the individuals who completed NAPFA's DEI Training and Certificate Program this summer.

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-Chairs Mindy Neira, CFP®, ChSNC® and John Eing, CPA, MBA, CFP®, along with committee member Daria Victorov, CFP®.

Congratulations to the following individuals, who are part of the most recent cohort to complete the program: You are correct. Here is the correctly ordered list: Sonia Brinkman, Chris Hansen, Benny Higgenbotham, Samantha Macchia, Kiersten Peshek, Jonathan Robertson, Cheryl Sherrard, Hannah Sillanpaa, Mollie Swann, Wendy Trout, and Shawn Tydlaska.

Registration for the next NAPFA DEI Training & Certificate Program is now available. The program will take place in Nashville in conjunction with the NAPFA 2024 Fall National Conference. For questions and details regarding the program, please contact TJ Baskerville, NAPFA's Director of Professional Development & Education, at baskervillet@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 4,600 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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