



**NAPFA**

THE NATIONAL ASSOCIATION OF  
PERSONAL FINANCIAL ADVISORS

Chief Executive Officer

**VETTED  
SOLUTIONS**  
A PASSION  
FOR PURPOSE

## POSITION OVERVIEW

The National Association of Personal Financial Advisors (NAPFA) is a tight-knit community of Fee-Only, Fiduciary Financial Planners who are committed to their clients' best interests ahead of their own. With a nearly 40-year history, members who hold the prestigious title, NAPFA-Registered Financial Advisors, are dedicated to comprehensive personal financial planning, maintaining the highest competency levels, and a client-centered focus.

Building on a solid financial and operational foundation, NAPFA is seeking a Chief Executive Officer (CEO) who will lead and manage the recently adopted 2022-2025 Strategic Framework that will drive Advocacy; Diversity, Equity, and Inclusion; and Professional Excellence. The new CEO will continue increasing public awareness of Fee-Only planning professionals, grow and diversify NAPFA's membership, and enhance the professional excellence of NAPFA members through a strong educational portfolio.

The CEO oversees NAPFA's business operations and provides day-to-day leadership and management of the committed staff team. Additional responsibilities include partnering with the Board of Directors, collaborating with highly-engaged volunteer committees and councils, and finance and budget management. The CEO serves as a spokesperson for NAPFA, making public appearances and maintaining relationships with the press, relevant associations, the higher education community, and government agencies.

The successful candidate will thrive in a mission-driven environment that emphasizes relationship-building and teamwork, consensus-building, diversity, equity and inclusion, and integrity. The ideal candidate will possess a background in association management and a passion for personal financial planning.

## KEY RESPONSIBILITIES

### Public Awareness

- Promote awareness of Fee-Only financial planning and the advisors' standards for consumers, legislators, and regulators.
- Coordinate internal and external marketing and communications programs promoting the organization's programs and services to potential and current members.

### Membership

- An engaged leader who is recognized as the face of the organization and builds membership, increases member involvement, and strengthens NAPFA's relevance for current and potential members.
- Develop membership engagement strategies that address Diversity, Equity, and Inclusion drivers.
- Create a culture that promotes membership volunteering for committee lead roles and member opportunities.
- Partner with local regional group leadership to ensure effective strategic alignment.

### Governance

- Lead all aspects of NAPFA's activities and relationships with its Board of Directors (Board), Regional Boards, committees, members, employees, profession, government and media, and assist in the development of the organization's Strategic Framework.
- Align the development and execution of all programs and activities in accordance with the organization's Strategic Framework.
- Provide support to the Board, directly or through delegation to staff, including developing plans and agendas for board meetings in concert with the Board Chair and Chair-Elect, and attending those meetings.
- Abide by NAPFA's high standards, ethics, and goals.

## **Staff Leadership**

- The CEO will serve as NAPFA's Chief Staff Officer.
- Define titles, responsibilities, and compensation of staff, delegating and holding staff accountable.
- Assure a work environment that recruits, develops, retains, and rewards a highly competent, engaged, and diverse staff within the budget approved by the Board.
- Hands-on leader and manager who is actively involved and actively serves on committees and other roles.

## **Advocacy**

- Proactively forge effective partnerships and collaborations to support a regulatory and legislative environment that recognizes financial planning as a profession and specifically supports the Fee-Only model.

## **Finance and Revenue Generation**

- Generate new revenue streams, including refining, expanding, and developing products and services for members in all areas of the profession.
- Partner with the Finance Committee to develop, implement, monitor, and report on NAPFA's budget.
- Work with the Chair, Secretary-Treasurer, and Finance Committee to produce proposed budgets, revenue enhancements, and expense controls ensuring a sound financial condition.
- Supervise the preparation of the financial records, providing financial reports to the Secretary-Treasurer and Board quarterly, and the financial reviews and budget approval annually.

## **Technology**

- Oversee NAPFA's technology capabilities and needs to support members, interact with the public, and have efficient operational systems.
- Strategically use technology to deliver NAPFA's services and information to members and other stakeholders.

## **Foundation Leadership**

- Serve as Executive Director of the NAPFA Consumer Education Foundation.

## **EXPERIENCE, QUALIFICATIONS, PERSONAL AND PROFESSIONAL QUALITIES**

- Bachelor's degree or equivalent experience; Master's degree or equivalent experience preferred.
- A minimum of 10 years of executive management experience, at the senior staff level or above, in association management or business management; C-Suite Experience is preferred.
- Familiarity with the personal financial planning profession and specifically the Fee-Only model is a plus.
- Highly effective and engaging communication skills – verbal, written, public speaking, and listening.
- A friendly, approachable, and positive individual with good interpersonal skills.
- A leader who shows evidence of being an innovative thinker, advancing new ideas that take the association to the next level.
- Provide financial management leadership and guidance to staff with P&L responsibilities.
- A consensus builder among diverse constituencies who is also an assertive decision-maker.
- Experience serving as a spokesperson for an organization.
- Experience developing and managing strategic plans, as well as implementing goals in an organized fashion.
- A deep understanding of the technological needs and functions of a membership organization.
- Demonstrated creative, collaborative, and charismatic leadership qualities.

- Proven experience effectively and efficiently managing professional staff, setting, and maintaining clear and consistent performance standards for goals.
- Familiarity with advocacy and or government relations.
- Successful at team building as an ongoing process.

## MEASURES FOR SUCCESS

The specifics regarding measures of success, including metrics, will ultimately be agreed upon by the new CEO and the NAPFA Board, but at the end of the executive’s first year, the Board would expect the following:

- A smooth transition of leadership has occurred, the CEO has established strong relationships with the Board of Directors, members, and staff, and communicates regularly and effectively.
- Solidified significant relationships with other organizations in the space, members, and key constituents.
- Maintains financial stability and has a vision for the growth of NAPFA.
- Enhanced NAPFA’s brand recognition and reputation for delivering education and events in the financial planning space.
- Creates and maintains a culture of diversity, equity, and inclusion at NAPFA.

## ABOUT NAPFA

The National Association of Personal Financial Advisors (NAPFA) is the country’s leading professional association of Fee-Only financial advisors—highly trained professionals who are committed to working in the best interests of those they serve. Our rich history began in 1983 when a group of advisors simply wanted to serve their clients without muddling the relationship with commissions. Since then we have developed high standards in the field and each advisor must sign and renew a Fiduciary Oath yearly and subscribe to our Code of Ethics. It’s all a part of the mission of NAPFA. The Association provides support and education for more than 4,400 practitioners all over the country and is governed by the NAPFA Board of Directors and supported by our four Region Boards.

NAPFA members live by three important values:

- To be the beacon for independent, objective financial advice for individuals and families.
- To be the champion of financial services delivered in the public interest.
- To be the standard bearer for the emerging profession of financial planning.

## NAPFA 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.

## WEB PRESENCE

Web [www.napfa.org](http://www.napfa.org)

Facebook [@NAPFAFeeOnly](https://www.facebook.com/NAPFAFeeOnly)

Twitter [@NAPFA](https://twitter.com/NAPFA)

LinkedIn [@national-association-of-personal-financial-advisors](https://www.linkedin.com/company/national-association-of-personal-financial-advisors)

YouTube [/NAPFA3250](https://www.youtube.com/channel/UCNAPFA3250)

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