

About FPA

The Financial Planning Association® (FPA®) is the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals, educators, financial services providers and students who seek advancement in a growing, dynamic profession. FPA supports members and their development and advancement through exclusive opportunities for professional education, business support, advocacy and community at the national and chapter levels. FPA is truly an indispensable force in the advancement of today's CFP® professional.

With a network of 88 chapters and state councils, thousands of CFP® professionals and members at large, FPA provides access to local opportunities including:

- Continuing education and networking opportunities with professionals in their area
- Study groups for those who are new to the profession and mentoring opportunities for experienced professionals; and
- Extensive tools, training, leadership, practice management and educational resources.

FPA is a leading voice on issues related to financial planning among legislators and regulators. Its efforts focus on highlighting the importance of competent and ethical financial planners in the delivery of financial services to consumers using the highest standards of professional conduct. FPA engages with federal and state regulators and legislators to advocate for policies to benefit consumers and financial planning practitioners.

FPA's current advocacy priorities are focused on:

- **Fiduciary Standard** – Support SEC rulemaking that would ensure that broker-dealers put customer's interests first when they are giving personalized investment advice to retail customers.
- **Appropriate Oversight of Investment Advisers** – Support more robust oversight of investment advisers by directing sufficient resources to improve current oversight programs.
- **Appropriate Regulation of Financial Planners** – Educate policymakers about the practice and the value of financial planning and the effect of policy decisions on practitioners and their clients.

In addition to its ongoing legislative and advocacy efforts, FPA participates in the Financial Planning Coalition (www.FinancialPlanningCoalition.com) with key partners to advise legislators and regulators and inform their decisions.

Power of Financial Planning

Financial advice, which most people in financial services provide, is transactional. Financial planning is transformative...especially when it's delivered by a financial planner who is committed to working in a client-centered, fiduciary-based way. That is the **power of financial planning**...to transform lives. But to realize this power, those delivering financial planning need the necessary competency IN financial planning. Competency is paramount and people need to know that the financial planner they are engaging is actually doing financial planning and has the competency required to be a financial planner.

Besides a financial planner's willingness to be forthcoming on how they are compensated for their services and any material conflicts of interest, FPA believes there are five questions everyone should ask a financial planner to gauge their competency in financial planning.

	<p>Is a financial planner a CFP® Professional? A financial planner who has earned the CFP® designation has demonstrated an ongoing commitment to accrue the necessary knowledge and experience to provide financial planning services to their clients. This is a starting point for financial planner competency.</p>
	<p>What areas of expertise should a financial planner have? Experience in retirement planning, tax, estate planning, education funding, insurance, cash flow, debt management and other areas are critical to the financial planning process. Even a base knowledge is required to ensure a financial plan is comprehensive.</p>
	<p>Does a financial planner have a specific area of specialty? If the financial planner states they have a defined area of specialty, he/she must be able to outline the qualifications they have, including any additional education and certifications.</p>
	<p>How long has a financial planner provided financial planning? There is an art and science to financial planning that sometimes takes experience to master. Time also allows the financial planner to refine the relational skills needed. Ask the financial planner how long he/she has been providing these services.</p>
	<p>How will a financial planner approach your specific situation? What process does the financial planner take in doing financial planning? What systems do they have in place and how will the plan be developed, presented and implemented? Be sure the financial planner is sensitive to your needs and wants and will approach your situation in a manner that makes sense for you.</p>

2019 FPA Leadership:

- Evelyn M. Zohlen, CFP® – 2019 FPA President
- Frank Paré, CFP® – 2019 FPA Chair
- Martin Seay, Ph.D., CFP® – 2019 FPA President-elect
- Lauren M. Schadle, CAE – Executive Director/CEO

Headquarters:

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Websites / Online:

- General: www.OneFPA.org
- *Journal of Financial Planning*: www.OneFPA.org/journal
- FPA Connect: <http://Connect.OneFPA.org/home>
- FPA on LinkedIn: www.linkedin.com/groups?mostPopular=&gid=114362
- FPA on Facebook: <https://www.facebook.com/FinancialPlanningAssociation>
- FPA on Twitter: <https://twitter.com/fpassociation>
- FPA on YouTube: www.youtube.com/fpatelevision
- *FPA Practice Management Blog*: <http://PracticeManagementBlog.OneFPA.org/>

Conferences:

Registration to these 2018 FPA events is complimentary for full-time journalists. To register, please contact FPA's Public Relations Team at PR@OneFPA.org.

- FPA Retreat: May 6 - 9, 2019 at Hilton Torrey Pines in Lajolla, Calif.
- FPA Annual Conference: October 16 - 18, 2019 in Minneapolis, Minn.

Evelyn M. Zohlen, CFP®

2019 FPA President



Evelyn M. Zohlen, CFP® currently serves as volunteer president for the Financial Planning Association® (FPA®), the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals in the country, and includes many others who support the financial planning process.

Zohlen is the founder of Inspired Financial, LLC – a fee-only wealth management practice that specializes in serving women in transition in southern California. Prior to founding Inspired Financial, she was a Relationship Manager at The Vanguard Group. She received her Bachelors degree from the University of Texas, her Master of Science from the Joint Military Intelligence College, and her MBA from Villanova University.

Zohlen is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional and is past chair of the Financial Planning Association of California. She is on the Advisory Board for the Center for Investments and Wealth Management at the University of California at Irvine and has served in a variety of community leadership roles including the Board of Directors for WomanSage.

Prior to entering the financial services profession, Zohlen served as an intelligence officer in the United States Air Force. She is married with three terrific “bonus” children.

Frank Paré, CFP®

2019 FPA Chair



Frank Paré, CFP® currently serves on the board of directors as the volunteer chair for the Financial Planning Association® (FPA®), the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals in the country, and includes many others who support the financial planning process.

Paré started his career over 22 years ago. He holds an MBA in management and is a CERTIFIED FINANCIAL PLANNER™ (CFP®) professional in a private practice in Oakland California.

Paré currently serves on the boards of the Financial Planning Association – East Bay Chapter and the Personal Financial Planning Board at the University of California at Berkeley. He has also served on the Public Policy Council for the CFP Board in Washington D.C. For his work, Paré was honored in 2011 with the FPA Heart of Financial Planning Award and in 2012 with the FPA Leadership in Action Award.

Martin Seay, Ph.D., CFP®

2019 FPA President-elect



Dr. Martin Seay, Ph.D., CFP® currently serves as the president-elect of the board of directors for the Financial Planning Association® (FPA®), the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals in the country, and includes many others who support the financial planning process.

Dr. Seay is Program Director and Associate Professor of Personal Financial Planning at Kansas State University, where he oversees and teaches in the CFP Board-registered undergraduate, graduate certificate, master's and Ph.D. programs. His research focuses on borrowing decisions, how psychological characteristics shape financial behavior, and methodology in financial planning research. His work has been published in the *Journal of Financial Planning*, *Journal of Behavioral Finance*, *Journal of Financial Counseling and Planning*, *Financial Services Review*, *Journal of Consumer Affairs*, *Journal of Financial Services Professionals*, *Journal of Family and Economic Issues*, *Journal of Financial Therapy*, among others.

His research has been recognized with the 2014 and 2017 FPA Annual Conference Best Applied Research Paper Award, the 2016 CFP Board's ACCI Financial Planning Award, and the 2016 Montgomery-Warschauer Award, which is awarded by the *Journal of Financial Planning* for the paper that provided the most outstanding contribution to the betterment of the profession in the previous year. Additionally, he was awarded the Kenneth Tremblay Early Career Housing Award from the Housing Education and Research Association in 2016 and the Richard L. D. Morse Early Career Award from the American Council on Consumer Interests in 2018.

Dr. Seay received his Ph.D. in Housing and Consumer Economics with an emphasis in Personal Financial Planning from the University of Georgia and is a director for the Academy of Financial Services. He also currently serves on the editorial review boards for the *Journal of Financial Planning* and the *Journal of Financial Therapy*.

Lauren M. Schadle, CAE

Executive Director and CEO



Lauren M. Schadle, CAE is the executive director and chief executive officer for the Financial Planning Association® (FPA®). In this role, she oversees all of the organization's member-focused operational and strategic efforts.

She has worked in the association and not-for-profit sector since 1989. Prior to assuming the CEO role in October 2012, Schadle had been FPA's associate executive director and chief operating officer since 2006. She had joined FPA's predecessor organization, the Institute of Certified Financial Planners (ICFP), in 1996 as its director of membership and marketing. Before joining ICFP, she worked for the National Professional Management Corporation, an association management company focused on serving the medical profession. She also worked at the California Medical Association, first for its for-profit subsidiary Physicians' Advantage, and then subsequently led the overall marketing communication initiatives for the organization. In addition, Schadle served as public relations/media associate for New York-based Catalyst, a research and advisory firm.

Schadle received her Bachelor of Science degree in communications from Rutgers University and her Master of Science degree in marketing from the University of Colorado. She served as the 2011-12 president of the Colorado Society of Association Executives and served on the CSAE board through 2013. She is a member of the American Society of Association Executives and received her Certified Association Executive (CAE) designation in 2005.

Resources for Journalists

The Press Room on the FPA website is a single source for journalists to learn all that is transpiring in the association. [Access](#) the Press Room now.

- FPA members serve as expert sources on a variety of topics such as retirement planning, small business planning, family and marriage planning, and can also speak to client issues in a particular profession, or with different income and asset levels. Contact Ben Lewis or Ryan Harrah from FPA's Public Relations Team at BLewis@OneFPA.org or RHarrah@OneFPA.org.
- Reporters working on deadline can submit their story query using FPA MediaSource - an automated system that sends the query to CFP® members of FPA across the country. Access FPA MediaSource at www.OneFPA.org/MediaSource.

Publications:

- FPA's award-winning *Journal of Financial Planning* features prominent writers and stories that enhance the knowledge and understanding of the evolving technical aspects of financial planning. [Visit](#) the *Journal* today.
- FPA and the *Journal of Financial Planning* are committed to helping financial planning professionals run their businesses more efficiently, effectively, and profitably. Part of this commitment is providing FPA members and others in the financial planning profession with the latest practice management content from some of the leading experts in the field. The *FPA Practice Management Blog* is populated frequently with helpful posts on marketing, client skills, technology, HR/staff, compliance, operations and more. [Access](#) the blog today.

Research:

- The FPA Research and Practice Institute™ (RPI) connects advisers to practice and business management insights to help them achieve business success. RPI conducts original research on business-centric topics and issues, including operations, personnel, human resources, marketing and technology. Detailed analyses, reports, whitepapers and resources, based on the research, are made available to financial planning professionals to help them identify their business gaps and address them.
- RPI studies are now available, including studies on the future of practice management, productivity, client communications, investment trends, and business growth strategies. [Access](#) the research today.

FPA wants to help journalists do their jobs. That's why we created FPA MediaSource - an automated media query platform that connects journalists with CERTIFIED FINANCIAL PLANNER™ (CFP®) professional members of FPA who are proficient in all areas of personal finance and are standing by to help journalists with the stories they are writing/producing.

To send a query, simply go to www.OneFPA.org/MediaSource.

Press Room > Submit a Media Query

The following form is for use by members of the media to identify FPA members who can serve as sources for stories. When completed, an email is sent to members of FPA who will provide responses. Inquiring media will receive individual emails with those FPA member responses. Please note that your email will not be shared with FPA members.

Please note that if you are looking to speak with someone from FPA leadership, or are looking to get an official statement on an issue from FPA, please do not use this form. Instead, contact FPA's Director of Public Relations [Ben Lewis](mailto:Ben.Lewis@fpa.org), 303-867-7190.

First name

Last name

Outlet name

Email address





Phone number

Story topic

Story detail

Deadline 12 AM 00

Time zone Mountain

Type the text [Privacy & Terms](#)

Here's how it works in six easy steps:

1. A journalist goes to the online form and submits a query.
2. The system sends an email to CFP® professional members.
3. Interested members then go to an online form to provide their contact details and initial thoughts on the topic.
4. The system then sends the inquiring journalist an email with the reply.
5. The journalist then vets the responses coming in and chooses the planner(s) they want to engage for the story.
6. The journalist then reaches out to those planners he/she wants to interview.

A couple things to know about the platform:

- We do not provide the journalist's name or email address to protect them from being sent information they don't want.
- When the deadline hits, the query is automatically shut off. This is done to prevent planners from responding to a query after the journalist has already filed their story.
- If a journalist would like to speak to an FPA representative or get an official FPA position, they are encouraged to reach out directly to the FPA Public Relations Team.

Contact us

If FPA can help you in your reporting, please let us know. Our Public Relations Team is eager to help. Please contact:

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