

2025 PRESS KIT
FINANCIAL PLANNING ASSOCIATION





YOUR PARTNER IN PLANNING™

For 25 years, the Financial Planning Association® (FPA®) has been the leading membership organization for CERTIFIED FINANCIAL PLANNER® professionals and those engaged in the financial planning process.

FPA is the CFP® professional's **partner in planning** by helping them realize their vision of professional fulfillment through practice support, learning, advocacy, and networking.



ABOUT FPA

Since 2000, the knowledge and support that FPA provides has helped shape the futures of countless members.

FPA has inspired our members to take that next step and find a path forward so they can realize their full potential.

We accomplish this by being our members' partner in planning by delivering four key benefits:



PRACTICE SUPPORT

FPA supports you with business insights and vast savings on tools you need.



LEARNING

FPA provides you with relevant and accessible educational content.



ADVOCACY

FPA helps you be an advocate for financial planning.



NETWORKING

FPA provides you with unmatched networking with a vibrant community of planners.

Our members apply these benefits to their work daily – for their clients, businesses, and themselves.



EXECUTIVE BIOGRAPHY



PAUL BRAHIM, CFP®

2025 FPA President

Paul Brahim, CFP®, currently serves as the volunteer president of the Financial Planning Association® (FPA®), the leading membership organization and trade association for CERTIFIED FINANCIAL PLANNER® professionals and those who support the financial planning process.

Brahim has truly lived the American Dream—beginning his career in financial services with no formal training and raising through the ranks to hold prestigious positions like CEO of BPU Investments. As an advisor at Wealth Enhancement Group, Brahim uses his financial planning, investment management and business skills to work with CEOs on their retirement and succession plans. He also provides guidance with regard to their employee retirement and financial wellness programs.

Brahim is very active in his community with organizations like the Heritage Community Initiative, the Navy Seal Foundation and the Financial Planning Association. He has also acted as an expert witness for a variety of legal cases. Brahim stays active by swimming, biking and running; as well as tackling Colorado's famous fourteeners.

EXECUTIVE BIOGRAPHY



CLAUDIA KANE, CFP®

2025 FPA Past President

Claudia Kane, CFP®, CIMA, CPWA®, ADPA®, CDFA®, currently serves as the volunteer past president of the Financial Planning Association® (FPA®), the leading membership organization and trade association for CERTIFIED FINANCIAL PLANNER® professionals and those who support the financial planning process.

Kane has been a financial adviser since 1985, when she started her career with Merrill Lynch. As an independent advisor with Raymond James Financial Services and a Certified Divorce Financial Analyst (CDFA®), Kane specializes in helping clients improve their financial future as they transition through divorce.

Kane has served as the Director of Advocacy for the FPA of Northern California, and sat on the FPA of California – a coalition of FPA chapters in California. Kane previously served on the Board of Investments and Wealth Institute (formerly IMCA) and has served in a variety of community leadership positions, currently serving as President for Court Appointed Special Advocates (CASA) of El Dorado County.

Kane received her Bachelor's degree from Queen's University, Belfast, Northern Ireland, and studied at the Wharton School and the Booth School to earn her CIMA® and CPWA® credentials.

Kane is an avid golfer, sculler, and is a U.S. Rowing Referee.

EXECUTIVE BIOGRAPHY



DANIEL GALLI, CFP®

2025 FPA President-elect

Dan Galli, CFP®, currently serves as the volunteer president-elect of the Financial Planning Association® (FPA®), the leading membership organization and trade association for CERTIFIED FINANCIAL PLANNER® professionals and those who support the financial planning process.

Galli is founder of Daniel J. Galli & Associates and began his financial services career over 30 years ago following a successful career as a public-school teacher. His practice includes a wide range of advisory services including investment management and financial planning. Galli focuses on retirement planning for professionals, small business owners, teachers, and other individuals.

From 1997 to 2005, he served as an adjunct faculty member on the staff of Northeastern University in Boston, teaching courses in their CFP® program on Retirement Planning and Employee Benefits as well as Insurance and Financial Planning. In 2005, he became a guest lecturer at Boston University, teaching Retirement Planning and Employee Benefits.

Galli is a long-time member of the Financial Planning Association of Massachusetts and has served on several committees, the Board of Directors, and as President for two years. He was named Financial Planner of the Year in 2017.

Galli holds a B.S. from Boston University and an M.Ed from Bridgewater State College. He taught at Hatherly School in Scituate, Mass., for 11 years prior to beginning his financial services career. Dan is also a Chartered Financial Consultant (ChFC) and Chartered Life Underwriter (CLU) as well as a CFP® professional.

EXECUTIVE BIOGRAPHY



PATRICK MAHONEY

Chief Executive Officer

Patrick D. Mahoney is CEO of the Financial Planning Association® (FPA®), the leading membership organization and trade association for CERTIFIED FINANCIAL PLANNER® professionals and those who support the financial planning process.

He is an experienced CEO, business leader, and strategist with a background across diverse organizations in the financial services, technology, and mission-based sectors. He is recognized for building and mentoring diverse teams and creating growth strategies that integrate the passion and expertise of an organization's stakeholders and employees to meet its goals and mission.

Mahoney's career began in product development and management in the United States and Asia, later evolving to sales, marketing, and general management. He has held executive leadership positions with breakthrough global organizations embracing membership value, innovation, growth, and change management, such as the Financial Planning Association and Standard & Poor's (now S&P Global Ratings).

An innovative and strategic problem solver, Mahoney is the holder of patents in the United States, Canada, and Great Britain. He is a Board Member of Saint Joseph's University Haub School of Business.

Mahoney is a graduate of Saint Joseph's University, Philadelphia, PA.

THE POWER OF FINANCIAL PLANNING



Financial advice is transactional, but financial planning is transformative—especially when guided by a client-focused, fiduciary financial planner. True financial planning has the power to change lives, but this requires planners to have the right skills and expertise. Competency is key; clients must trust that their planner is qualified and truly practicing financial planning.

To assess a planner's competency, FPA suggests asking five essential questions, alongside understanding their compensation and any conflicts of interest.



1

IS THE FINANCIAL PLANNER A CFP® PROFESSIONAL?

A financial planner who has earned the CFP® certification has demonstrated an ongoing commitment to accrue the necessary knowledge and experience to provide financial planning services to their clients. This is a critical starting point!



2

WHAT EXPERTISE DOES THE FINANCIAL PLANNER HAVE?

Experience in retirement, tax, estate planning, education funding, insurance, cash flow, debt management, and other areas is critical to the financial planning process. Even a base knowledge is required to ensure a financial plan is comprehensive.



3

DOES THE FINANCIAL PLANNER HAVE AREAS OF SPECIALTY?

If the financial planner states they have a defined specialty area, he/she must be able to outline their qualifications, including any additional education and certifications.



4

HOW LONG HAS THE FINANCIAL PLANNER BEEN PLANNING?

Financial planning is an art and science that sometimes requires experience to master. Time also allows the financial planner to refine the necessary relational skills. Ask the financial planner how long they have been providing these services.



5

HOW WILL THE FINANCIAL PLANNER WORK WITH YOU?

What process does the financial planner take to do 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.

FPA MEDIASOURCE

The only stop you need to find a CFP® professional who can help.

FPA wants to help journalists do their jobs. That's why we created FPA MediaSource—an automated media query platform that connects journalists with financial planners who have earned CFP® certification and demonstrated proficiency in all areas of personal finance. Here's how it works in six easy steps:

- A journalist goes to the online form and submits a query.
- The system sends an email to CFP® professional members of FPA who have opted in to participate.
- Interested members then go to an online form to provide their contact details and initial thoughts.
- The system then sends the inquiring journalist an email with the replies submitted by members.
- The journalist then vets the responses and chooses the planner(s) they want to engage for the story.
- The journalist then reaches out to those planners he/she wants to interview.

**FPA HAS
SENT MORE
THAN 8,500
JOURNALIST
QUERIES!**

AS OF NOV. 19, 2024

A couple of things to know about the platform:

- The journalist's name or email address is not included in the queries to protect them from being sent information they don't want.
- When the deadline hits, the query is automatically shut off to prevent late responses.
- While it is understood and expected that some journalists will use what is submitted in the responses, it is encouraged that journalists inform the member(s).
- If journalists want to speak to an FPA representative or get an official FPA position, they are encouraged to contact FPA's Chief Communications Officer.



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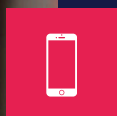


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**LET FPA HELP YOU WITH ALL
THAT YOU'RE WORKING ON!**