


FPA Chapter Leaders Conference 2025 Agenda

Wednesday, January 29		
9:00 AM – 5:00 PM	Chapter Executive Pre-Conference Meeting	
2:00 PM – 5:00 PM	Advisory Council Meeting	
3:00 PM – 4:00 PM	Pro Bono Training: Available to all CLC CFP® member attendees.	
6:00 PM – 7:00 PM	President's Reception	
7:00 PM – 9:00 PM	Chapter Executive Dinner	
Thursday, January 30		
6:30 AM – 8:30 AM	Hotel breakfast on your own	
8:30 AM – 9:30 AM	Opening General Session: State of FPA Update	
9:30 AM – 9:45 AM	Break: Networking and Coffee	
9:45 AM – 10:30 AM	General Session: FPA Advocacy Update Join FPA leadership for an update about the progress made on FPA's priority advocacy initiative to provide for the legal recognition of the title "financial planner." This session will include an overview of internal and external stakeholder feedback received thus far, opportunities to get more involved in this important work moving forward, and the chance to ask a panel of FPA leadership your questions about this effort to-date.	
10:30 AM – 10:45 AM	Break: Networking and Coffee	
10:45 AM – 11:45 AM	Breakout Sessions Block #1 <ol style="list-style-type: none"> Introduction to FPA Strategic Plan: Join FPA national leaders to learn more about the FPA Strategic Plan and how your chapter can leverage this foundational document in your local efforts. Financial wellness/Community Outreach Update: Join us to hear updates and learn how to advance our impact on financial education and wellness through legislative advocacy and organizational partnerships and collaboration. Diversity, Equity and Inclusion Basics: Learn from DE&I professional Jewell Fears to understand the basics of DE&I and how to manage local programs. FPA Primer: This comprehensive session provides an overview of the FPA ecosystem, detailing how chapters and national partner to positively impact the membership experience and support the profession. Everything from roles and responsibilities to resources available will be addressed. Whether you're new to local leadership or have experience, you will leave this session with a better understanding of your role and how it fits into FPA's success. 	
11:45 AM – 1:15 PM	Networking Lunch and Learn	

1:15 PM – 2:15 PM	Conversation Carousel: Meet with valued FPA partners, national staff and our Board of Directors to learn how to plug into national initiatives and share what you’re doing locally. This timed round-table event is always a conference favorite. We can’t wait to chat with you!
2:15 PM – 2:30 PM	Break: Networking and Coffee
2:30 PM – 3:30 PM	<p>Breakout Sessions Block #2</p> <ol style="list-style-type: none"> 1. President/President-elect Foundations: This interactive session provides the orientation current presidents and presidents-elect need to lead their chapter with confidence. 2. Membership 101 – Essentials for Chapter Success: Whether you’re a seasoned volunteer leader or new to your chapter role, this session is designed to equip you with the tools and insights you need to effectively manage membership operations at the local level. Join FPA’s expert membership team to explore practical tips, helpful resources and strategies to foster engagement and growth. 3. Pro Bono Essentials: Join us to learn steps, best practices, and resources for creating and augmenting a sustainable pro bono program for your chapter. FPA’s Community Engagement expert will prepare leaders for how to engage local organizations, create local programs, and support national initiatives in this engaging session. 4. Public Relations Fundamentals: Learn from the experts at FPA regarding how to engage local media to amplify your chapter’s message to grow membership, promote your chapter, support partners and more!
3:30 PM – 3:45 PM	Break: Networking and Coffee
3:45 PM – 4:45 PM	<p>Breakout Sessions Block #3</p> <ol style="list-style-type: none"> 1. Mining Your Membership Data: Dive into the wealth of information available through FPA’s comprehensive membership reporting tools. In this session, the Membership team will guide you through accessing and utilizing these robust resources to support your chapter’s goals. Discover how to leverage data to better understand your members, drive engagement, and shape impactful local strategies. 2. Your NexGen Strategy: Join FPA NexGen Chair Landon Warmund to learn about national NexGen initiatives, local opportunities and how to leverage NexGen members in your chapter engagement and leadership. 3. Chapter Staff and Board Relations: Join us to understand how chapter executives and boards should work together. We’ll discuss the typical duties of a chapter executive, roles of the board, and how to leverage synergies and expertise for a long-term, positive partnership.

	4. Advocacy Roundtable: Join us to discuss Title Protection, local Advocacy and more during this interactive session. 3.
4:45 PM – 5:45 PM	Community time: work on your strategic plan/implementation, meet with FPA Staff, connect with National Board, or network amongst yourselves
5:45 PM – 6:45 PM	Reception
Evening	Dinner on own/sponsor dinners
Friday, January 31	
6:30 AM – 9:00 AM	Hotel breakfast on your own
9:00 AM – 10:00 AM	<p>Breakout Session Block #4</p> <ol style="list-style-type: none"> State of Membership – Insights and Opportunities: Get a comprehensive look at the current state of FPA membership and the strategies shaping our future. In this session, FPA will share key trends, opportunities, and plans for 2025 and beyond, highlighting how chapters can align with and benefit from these initiatives. Join us to gain valuable insights, understand what’s ahead, and explore how your chapter can leverage these efforts to enhance member engagement and growth. Chapter Leadership Essentials: How do you influence others? How do you manage your culture to ensure your chapter’s success? Join us to learn the essentials and share best practices with your peers. Student Engagement: Students are the future of the profession and an integral part of FPA’s membership. Learn how to create and leverage relationships with students, local colleges and universities, and support student communities. Maximizing Partnerships: Learn how to develop mutually beneficial relationships with your partners to ensure that everyone reaches their goals. Learn from partners how to engage with them and how to approach sponsorship conversations.
10:00 AM – 10:15 AM	Break: Networking and Coffee
10:15 AM – 11:15 AM	Community time: work on your strategic plan/implementation, meet with FPA Staff, connect with National Board, or network amongst yourselves
11:15 AM – 12:15 PM	Lunch
12:15 PM – 1:15 PM	<p>Breakout Session Block #5</p> <ol style="list-style-type: none"> Learning: Content is king. How to bring engaging content to your members that encompasses the growing profession while still balancing the need for CE? Join us for an interactive session to talk about it all! Marketing Strategy for Chapters: FPA’s Marketing guru will be on hand to discuss best practices, technology and

	<p>ways to maximize your chapter’s messaging to as many audiences as possible.</p> <p>3. Volunteer Engagement: Working with volunteers is one of the most important roles of a chapter leader. It’s also the most complex. Join us to learn strategies for recruiting, engaging and retaining volunteers during this interactive session.</p> <p>4. Membership Data 2.0: Bring your devices to meet directly with FPA staff to obtain support on navigating reports, accessing resources and interpreting your chapter’s membership data.</p>
1:15 PM – 1:30 PM	Break: Networking and Coffee
1:30 PM – 2:30 PM	<p>Closing General Session: The Power of a Value Proposition – and How to Define It</p> <p>Discover how to articulate your brand’s unique value in a way that captivates your audience and differentiates you from competitors. Learn the core principles of value propositions, explore examples of successful brands, and develop tools to craft a message that resonates with your target market. Walk away with actionable insights to elevate your brand and drive meaningful connections.</p>