



**FINANCIAL  
PLANNING  
ASSOCIATION**  

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ARIZONA

## **FPAAZ Volunteer Opportunity**

### **Community Connections Group Lead**

Help us make Arizona the most engaged financial planning chapter in the country—one real relationship at a time.

#### **Why This Role Matters**

We're building the most engaged financial planning chapter in the country—not by accident, but through nurturing strong relationships. The Community Connections Group Lead is a key action center for this vision. This opportunity is about cultivating belonging across members, catalysts, partners, and broader financial planning community stakeholders.

Help FPA Arizona feel like home to planners at every stage of their journey.

You won't just represent FPAAZ—you'll shape how people experience it.

#### **What You'll Do**

- Guide and support 5 micro-teams: Membership, NexGen, Partnership, Catalyst, and Professional Relations
- Champion new member onboarding.
- Nurture a chapter-wide culture of welcome and inclusion by motivating all of our planners to express their interests and passions through chapter activities.
- Work closely with Communications, Professional Development, and Advancing the Profession Group Leaders toward seamless, coordinated teamwork.
- Maintain relationships with key stakeholder contacts (e.g., partners, professional groups and allied nonprofits, catalyst firms)
- Introduce micro-teams and inspire fellow planners to join in and help where they can
- Collaborate closely with the CEO to bring your ideas to thoughtful, effective action
- Attend quarterly working group syncs and report milestone updates to the Board of Directors.

#### **You're a Great Fit If You Are...**

- A natural connector who thrives on building authentic relationships
- Passionate about growing the financial planning profession through people, not just programming
- A team-builder with the organizational skills to guide multiple micro-teams
- Motivated to help others find a sense of belonging and shared purpose
- Comfortable with outreach calls, warm check-ins, and collaborative follow-through

Vision: The Essential Hub of our Financial Planning Community.

Mission: We empower financial planners by connecting them with the resources necessary to elevate their community impact



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### **Ideal Member Profile**

- Career Stage: Mid-career financial planner or operations/marketing professional
- Background: Experience in firm culture, community partnerships, talent recruiting, or client experience responsibility
- Strengths: Relationship-building, exceptional communication, and no fear outreach
- Ambitions Served: Flex your marketing and sales muscles, strengthen your people management skills, increase your visibility as a thought leader in Arizona, gain deeper insights into a wide variety of RIA and financial advice firms' culture and operations

### **Time Commitment**

- ~6-8 hours/month
  - 1 hour/month team Zoom
  - 1–2 hours/month on micro-team check-ins and coordination
  - Quarterly update syncs with General Circle and/or Board of Directors
- Pending: CFP Experience and when matched to Principle Knowledge Topics Education credits

### **Support & Leadership Development**







- Volunteer onboarding regularly available via Monday Hubbles
- Scheduled leadership trainings through Leadership Academies and PDP+ Curriculum
- Planned access to Admin staff as budgeted and scheduled
- Collaborative effort with CEO as executive and resource

### **FPAAZ Values in Action**

Trust • Collaboration • Stewardship • Leadership

This role brings these to life through connection, hospitality, and shared success.

### **Learn More & Get Involved**

-  <https://fpaaaz.org/Volunteer-Roles>
-  <https://fpaaaz.org/Structure>
-  <https://fpaaaz.org/Teams-and-Aims>
-  [https://fpaaaz.org/Inputs\\_Outputs](https://fpaaaz.org/Inputs_Outputs)
-  Contact: [CEO@fpaaaz.org](mailto:CEO@fpaaaz.org) |  480-483-9035

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