



**FINANCIAL
PLANNING
ASSOCIATION**

ARIZONA

FPAAZ Volunteer Opportunity

Advancing the Profession Group Lead

Elevate the profession. Serve the public. Shape the future.

Why This Role Matters

Financial planning is more than a career—it's a calling. The Advancing the Profession Group Lead ensures FPA Arizona is walking the walk in advocacy, financial literacy, public awareness, and pro bono service. This role empowers and guides micro-teams to uphold the highest standards of professional integrity while broadening the reach and visibility of the financial planning profession across Arizona.

You'll be at the helm of how FPAAZ gives back, speaks up, and stands out.

What You'll Do

- Steward two primary areas:
 - Advocacy
 - The Financial Literacy Initiative, supported by micro-teams in Financial Education, Public Awareness, and Pro Bono
- Recruit and coach micro-team leads to drive meaningful, aligned initiatives
- Coordinate team efforts to align with FPAAZ's strategic plan and community values
- Liaise with FPA National on advocacy and public-facing initiatives
- Collaborate with Communications, Community Connections, and Professional Development group leads
- Serve as a strategic voice in financial literacy event planning, outreach, and public engagement
- Collect and share outcomes that highlight the profession's value and community benefit
- Inspire volunteers to contribute to equity, access, and trust in the profession

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

- A visionary who sees what the profession can become
- A steward who protects public trust and ethical standards
- A coach who supports and empowers others to lead
- A doer who keeps initiatives focused, impactful, and connected

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

- Designation: CFP® professional or CPA/PFS
- Background: Client education, nonprofit leadership, public service, or financial policy
- Strengths: Communication, delegation, collaboration, and relationship-building
- Ambitions Served: Grow your leadership credibility, contribute to systemic impact, gain visibility in the national FPA network, influence how the public sees the financial planning profession

Time Commitment

- ~6-8 hours/month
 - 1 hour/month team Zoom
 - 1–2 hours/month on micro-team check-ins and initiative 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 values forward in service to both the profession and the public.

Learn More & Get Involved

- 📍 <https://fpaaz.org/Volunteer-Roles>
- 🗺️ <https://fpaaz.org/Structure>
- 🔗 <https://fpaaz.org/Teams-and-Aims>
- 📄 https://fpaaz.org/Inputs_Outputs
- 📧 Contact: CEO@fpaaz.org | ☎️ 480-483-9035

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