

CFP BOARD

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Managing Director, Program Development

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A PASSION FOR PURPOSE

About CFP Board

CFP Board is the professional body for personal financial planners in the U.S. CFP Board consists of two affiliated organizations focused on advancing the financial planning profession for the public's benefit. CFP Board of Standards (501 (c)(6)) sets and upholds standards for financial planning and administers the prestigious CERTIFIED FINANCIAL PLANNER™ certification — widely recognized by the public, advisors and firms as the standard for financial planners — so that the public has access to the benefits of competent and ethical financial planning.

CFP® certification is held by nearly 100,000 people in the U.S. CFP Board Center for Financial Planning (501(c)(3)) addresses diversity and workforce development challenges and conducts and publishes research that adds to the financial planning profession's body of knowledge.

This position is part of the 501 (c)(3) entity and is based in the Washington D.C. office. The CFP Board works a hybrid schedule, which could be changed at any time. Travel is required of this position.

The Managing Director of Program Development leads the innovation, development and delivery of programs, products and services that advance the financial planning profession for the benefit of the public. Key areas of focus include initiatives that:

- Support CFP® professionals delivery of competent advice to their clients;
- Increase the diversity of the financial planning profession
- Stimulate and nurture a vibrant and prolific academic community conducting research that advances the profession and helps certificants deliver better advice to the public;
- Leverage existing CFP Board content to develop new, revenue-generating distribution channels;
- Support CFP professionals in complying with laws, regulations and CFP® standards;
- Help candidates prepare for and pass the CFP® exam;
- Enhance the value of CFP® certification; and
- Position CFP Board as the professional body for financial planning.

Responsibilities encompass conference and event programming as well as delivery of compelling content through online and print channels. In addition, the position contributes to a culturally competent financial planning profession. Managing Director of Program Development collaborates closely with the Managing Directors of Research, Workforce, and Corporate Relations —all reporting directly to the Chief Program Officer.

Key Accountabilities

- Serves as a key member of the Executive Leadership Team (ELT) that sets the organization's strategic direction;
- Drives and documents overall program development business strategy;
- Identifies and leads new program opportunities aligned with organizational priorities—with a sense of urgency;
- Determines resourcing needs for programs identifying critical subject matter expertise and organizational capacity for success;
- Assesses existing programs for impact, value and relevance; sunsets non-performing efforts with political sensitivity;

- Builds external partnerships with academia, thought leaders, and others in the financial advice ecosystem that can be helpful to CFP Board’s program development efforts;
- Collaborates with other CFP Board subject matter experts to broaden distribution of, and monetize existing content;
- Collaborates with the managing director of corporate relations to develop programs aligned with CFP Board priorities—that funders find valuable and worthy of support;
- Represents CFP Board to donors, partners and other external stakeholders;
- Identifies and tracks opportunities and marketplace trends for consideration in program development;
- Serves as the executive sponsor to the Women’s Initiative (WIN) and Diversity Advisory Group;
- Maintains reporting to support and enhance the program development organizational goals;
- Creates program budgets and justifications; monitors and reports on status of budgets; and
- Performs other duties as assigned.

Position Requirements

- Bachelor’s degree in business or related field; graduate degree preferred
- A minimum of 10 years of experience in program development, learning and development, or organizational development; project management experience a plus
- CFP® certification a plus
- Demonstrated experience in creating new programs and reinvigorating existing programs deemed valuable by stakeholders and sponsors
- Strategic thinker with the ability to identify and articulate creative solutions to problems related to program development and education
- Demonstrated political acumen and ability to synthesize input from a variety of interests into a coherent strategic agenda
- Ability to conceptualize, interpret and use market research to advance business strategy and to make sound business decisions based upon data
- High level of professionalism and ability to work well with all levels of internal management, staff and volunteers
- Ability to prioritize and manage multiple projects and people simultaneously, and follow through on issues in a timely manner
- Strong client focus
- Excellent time and project management skills; detail-oriented self-starter with high energy and the ability to work independently, accurately and on schedule
- Exceptional oral, written and presentation skills, and equally strong listening skills
- Ability to communicate effectively with multiple levels within the corporate community, including but not limited to board-level executives, CEO, and C-suite officials
- Entrepreneurial initiative, determination, and energy
- Ability to motivate staff in achieving and surpassing objectives

Digital Presence

Web <https://www.cfp.net/>

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Vetted Solutions

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Vetted Solutions is a Washington, D.C. based executive search firm specializing in association and nonprofit recruiting and consulting. We focus on CEO and senior staff positions.

For confidential consideration, please email your resume and cover letter to: CFPBoardMDPDSearch@vettedsolutions.com or call +1 202 544 4749.

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