

CFP BOARD

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Chief Program Officer

**Vetted
Solutions**

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 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 addresses diversity and workforce development challenges and conducts and publishes research that adds to the financial planning profession's body of knowledge.

The Chief Program Officer of the CFP Board is a senior-level executive and thought leader responsible for programs, including financial planner workforce development initiatives, profession's diversity, research, corporate relations and development work that supports the sustainability of the financial planning profession. This role ensures that the CFP Board's programmatic work is directed toward the most critical issues impacting the financial planning profession and aligned with the organization's mission, values and strategic plan.

The successful individual will inspire and motivate a talented team of 22 and will contribute to an organizational culture of collaboration, communication and impact. The Managing Director Workforce, Managing Director Program Development, Managing Director Research, and the Managing Director Corporate Relations will report to this position. The Chief Program Officer will report to the Chief Executive Officer of the CFP Board. Key programmatic areas include Workforce Initiatives, Diversity & Inclusion, Research, Academic Initiatives, Pro Bono, Conferences and *the Financial Planning Review*.

Key Accountabilities

- Program Development & Management – Working with the Managing Director - Programs, develop, implement, and oversee the organization's strategy to grow and optimize its program portfolio. Conduct impact assessments for new and existing initiatives to ensure appropriate resourcing and ROI.
- Workforce Pipeline – Working with the Managing Director, Workforce, develop a talent pipeline strategy and plan in support of the Workforce and Access strategic priorities of the CFP Board. This includes the Future Financial Planner and Student Engagement activities.
- Diversity & Inclusion – Working with the Director, Diversity & Inclusion, identify, develop and implement D&I initiatives to ensure that the CFP Board, its programming, and its sponsors work toward growing the number of CFP® certificants from underrepresented groups.
- Research – In conjunction with the Head of Research, develop and execute a dynamic, rigorous and relevant research agenda that:
 - quantifies the benefit of CFP® certification to the public, firms, individual advisors, and potential certificants;
 - positions CFP® certification for greater growth, relevance and impact;
 - anticipates, analyzes, and reports on the practice of financial planning including trends, impact, and outcomes.
 - provides quantitative evidence that facilitates organizational decision-making;

- Corporate Relations and Development – In conjunction with the Managing Director, Corporate Relations, grow CFP® certificant levels and revenues, develops and nurtures strategic alliances and relationships with firms, universities, fintech, and other stakeholders, and ensures a funding stream for the CFP Board’s programmatic work to include corporate and individual giving.
- Committee Engagement – Partner with volunteer advisory groups to guide implementation of programs aligned with the CFP Board’s strategic priorities.
- Leadership – Partner with the CEO and the Executive Leadership Team to advance the strategic goals of the organization, stewarding resources effectively, and modeling the organization’s values. Foster and support a high-performing team while contributing to an inclusive and equitable culture.

Position Requirements

- Visionary leadership and a track record of developing and delivering high impact programs and strategies to advance the CFP Board’s mission.
- A deep network of relationships within the key programmatic areas of the CFP Board and within the nonprofit sector broadly.
- Understanding of the financial services sector, the organization’s mission, and how certification and standards benefits the profession and the public.
- Experience with the successful design & implementation of a portfolio of comprehensive programs, initiatives and special events aligned with the organization’s mission and objectives as well as donor’s goals.
- A successful track record of raising money through major donors, corporate giving, sponsorship, individual and planned giving.
- Demonstrated ability to build, develop and lead a team of high performing executives.
- Strategic thinker with the ability to identify creative solutions to solve problems.
- Exceptional written, verbal, interpersonal, and presentation skills.
- Awareness, understanding, and accountability for financial performance including planning, budgeting and forecasting.
- Results orientation, strong organizational and prioritization skills, ability to multi-task, work collaboratively across an organization and with outside partners, and the ability to meet critical deadlines.
- Impeccable integrity and sound judgment; able to put the organization’s mission and impact first.
- Bachelor’s degree or equivalent experience. Advanced degree preferred.

Digital Presence

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

Facebook <https://www.facebook.com/CFPLetsMakeAPlan>

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LinkedIn www.linkedin.com/company/cfp-board/

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:
CFPBoardCPOSearch@vettedolutions.com or call +1 202 544 4749.

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