

The National Association of Personal Financial Advisors

Director of Professional Development & Education

Position Overview

The National Association of Personal Financial Advisors (NAPFA) is a tight-knit community of Fee-Only, Fiduciary Financial Planners who are committed to their clients' best interests ahead of their own. With a nearly 40-year history, members who hold the prestigious title, NAPFA-Registered Financial Advisors, are dedicated to comprehensive personal financial planning, maintaining the highest competency levels, and a client-centered focus. NAPFA is seeking a Director of Professional Development & Education to join their leadership team.

The Director of Professional Development & Education will be responsible for strategizing, developing, and executing the professional development and educational programs of the organization. Takes the lead in guiding the professional development and education staff team and collaborates with other service areas within the organization on both strategic and tactical levels.

Key Responsibilities

- Oversee all professional development and educational initiatives, including conferences, symposia and live courses, virtual learning, and self-study CE programs, offered by NAPFA. This includes two national conferences, four regional symposia, and 50 webinars (some of which are member engagement webinars).
- Conduct effective needs assessments, leveraging input from NAPFA members and other financial planning professionals, to curate content aligning with organizational goals and objectives.
- Develop, implement, and assess the multi-year continuing education business plan that supports NAPFA's strategy and addresses the evolving educational needs of financial planning professionals.
- Lead and actively participate in planning committees and task forces to design valuable and relevant educational content for both live and virtual programs.
- Utilize data to identify current issues and anticipate future topics for financial planning professionals, ensuring educational content remains relevant and timely.
- Review NAPFA's program portfolio and delivery channels to strategically meet end-user needs and adapt to changes in the profession.
- Proactively explore, recommend, and implement new learning technologies and enhancements to improve educational offerings.
- Develops program assessments and surveys that accurately measure learning and participant satisfaction.
- Conduct instructional quality reviews of educational programming to ensure high standards are maintained.
- Stay abreast of adult learning principles and standards in the learning/training industry, applying best practices to NAPFA's educational programs.
- Offer guidance to NAPFA components for local and regional educational programs.
- Develops and manages professional development & educational program budgets.
- Oversees the selection and management of relationships and contracts with external

vendors.

- Collaborates closely with NAPFA's communications and engagement teams to ensure effective and departmentally aligned strategies.
- Supervises a team that includes a Conference & Events Coordinator and a Senior Coordinator, Continuing Education to foster a high-functioning department.
- Serves as a contributing member of the senior staff team.
- Other duties as assigned.

Experience and Qualifications

- Bachelor's degree or a related field/equivalent experience. Certified Association Executive (CAE) designation a plus.
- 5 to 7 years+ progressive experience developing adult education. Experience developing learning products for financial professionals and/or association experience preferred.
- Proven experience in successfully leading and managing professional development and educational programs.
- Familiarity with Adult Learning Theory or similar theories/concepts. Understanding of instructional design methodology/concepts.
- Effective communication skills with a focus on collaboration and engagement.
- Strong creative, strategic, analytical, problem-solving, decision-making, and organizational skills.
- Demonstrated ability to develop and manage project budgets effectively.
- Experience in selecting and managing relationships with external vendors.
- Proven record of delivering projects on time and within scope.
- Supervisory experience, cultivating high-functioning teams.
- Ability to contribute effectively as a member of the senior staff team.
- Outstanding written and verbal communication skills, strong presentation skills, and public speaking ability.
- Proficiency in MS Office and Adobe Creative Suite. Experience with AMS, CMS, and/or CRM tools and other relevant technologies.
- Positive attitude in the workplace. Flexible, adaptable, and able to work in a small team environment.
- Flexibility for occasional travel (up to 20%) and additional hours.

Hybrid Work Arrangement

NAPFA employees enjoy a hybrid work arrangement with three remote workdays and two in-office collaboration days on Mondays and Tuesdays. (Subject to change based on organizational needs and policies). NAPFA is headquartered in Chicago, IL.

Digital Presence

Web: <https://www.napfa.org/>

X: <https://twitter.com/NAPFA>

LinkedIn: <https://www.linkedin.com/company/national-association-of-personal-financial-advisors/>

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

YouTube: <https://www.youtube.com/channel/UCz5dfb61JHACZuH3INSwmwA>

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Vetted Solutions is an executive search firm focused on serving the Board, CEO and senior staff recruitment needs of purpose driven organizations.

For confidential consideration, please contact Jim Zaniello, President & CEO, via NAPFADirDevandEdSearch@vettedsolutions.com or call +1 202 544 4749.

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