

Advocacy Committee

Advocacy in any professional association is designed to guarantee members are held in high regard by regulators, legislators and the public. FPA Advocacy works to advance the interests of FPA and CFP® professionals at the federal and state levels.

We educate policymakers and the public about the gaps in regulations and policies that provide for sound, ethical financial planning. We advocate for policies to benefit financial planning practitioners, our clients and the public.

Today, FPA's current advocacy priorities are focused on:

- Fiduciary Standard
- Appropriate Oversight of Investment Advisers
- Appropriate Regulation of Financial Planners

Silicon Advocacy Description

Our Advocacy Director also participates in FPA of CA to coordinate the advocacy activities of all California chapters. We seek to be a resource for our elected and appointed officials, offering an informed, professional perspective on legislative and regulatory issues.

Advocacy Director responsibilities include:

- **Reading** FPA's monthly *Capitol Update* and participating in monthly calls.
- **Advocating** for the recognition and regulation of financial planning and FPA's One Designation, One Profession position.
- **Communicating** important legislative or regulatory issues to chapter members.
- **Urging** chapter members to contact their legislator and take a position when we receive a legislative alert that affects us.
- **Promoting** member support of FPA's Political Action Committee.

Time Commitment

- On average, about 3-5 hours a month (reading Capitol Update, reporting on legislative and policy issues, and participating in monthly Advocacy call).
- Other activities:
 - State Advocacy
 - Advocacy Day in Sacramento (1-2 days, depending of FPA CA)
 - Meet with your assemblyperson, state senator and/or other policymakers in Sacramento.
 - FPA of CA Advocacy Week, September (2-3 hours)
 - Meet with your state legislators in their local district office.
 - Federal Advocacy
 - D.C. Advocacy Day (2-3 days, which includes travel time—*this is a nice to do if possible*)
 - Meet with your congressperson, senator or other policymaker in D.C.
 - Attend a District Meeting (2 hours, which includes travel and debrief time)
 - Meet with your federal legislators in their home district.