

FPA's Information and Transparency Policy

As an expression of its accountability and fiduciary responsibility as representatives of the membership of the Financial Planning Association® (FPA®), who are the owners and financial stakeholders in the continued success of the organization, the FPA Board of Directors has developed the following policy to ensure that FPA members receive timely and regular information about FPA's operations and ongoing strategic plans.

An information and transparency policy for FPA is important in order to ensure regular communication, to seek stakeholder input and feedback into the programs and processes of the Association, and to enhance trust.

The Board has instructed the Chief Executive Officer (CEO) and delegated staff to make available regular reports and documents to ensure that FPA consistently operates in a transparent manner in its responsibility to members on both the national and chapter levels.

Accordingly, operational documents are prominently posted on the FPA Web site for review under members-only access. Additional documents and reports, including financial information, are released upon request by contacting FPA Member Services at 800.322.4237.

The FPA Board of Directors recognizes, however, that not all of its strategic conversations and documents will be made public during their formative and deliberative stages. Confidentiality is reserved by the Board on a case-by-case basis when it pertains to specific personnel discussions, contractual agreements, litigation and any other conversations that would potentially violate agreements for confidential discussions and/or relationships with other parties.

To demonstrate our commitment to be open and transparent in our processes and communications, the following documents and reports are available to our members:

- Audited financial statements (located at <http://fpanet.org/AboutFPA/Organization/GoverningDocuments/>)
- FPA bylaws (located at <http://fpanet.org/AboutFPA/Organization/GoverningDocuments/> - PDF)
- FPA articles of incorporation
- Board meeting agenda prior to meeting
- Key actions taken by FPA Board at regular meeting
- Board meeting minutes
- Annual operational report (Includes a summary of FPA's financial performance for the past fiscal year and its overall financial health.(located at <http://fpanet.org/AboutFPA/Organization/GoverningDocuments/>)
- Highlights of new annual fiscal year budget
- Call for nominations to the FPA Board of Directors
- List of members who have been nominated for Board service
- FPA volunteer policies: confidentiality, conflict of interest and harassment.

- Call for volunteers to serve on various volunteer/staff work groups designed to support and advise FPA's strategic efforts.
- Link to Form 990 web site (Association tax returns)