

LEADERSHIP IN ACTION

FPA members inspire others in many ways, helping lead in their practice, local Chapter, community, family, and especially with their clients. FPA Leadership in Action helps highlight these “everyday” qualities of our members and remind us that we all have opportunities to lead.



Dave Hoyer,
member since 1993

Hoyer Financial Services,
Philadelphia, Pa.

“Attitude is a little thing that makes a big difference.”

—Winston Churchill

MAKE THINGS HAPPEN

A Leader in the Profession

Through his tireless work with various volunteers, board members, fellow planners, sponsors, organizations and partners over the years, Dave Hoyer never loses focus on the serious responsibility to provide service and assistance to others. Always going above and beyond the call of duty, Dave consistently delivers real value to everyone involved – earning the respect and appreciation of many of Philadelphia’s struggling communities along the way.

A true philanthropist who is passionate about pro bono work, he has provided tremendous service to The Pledging Tree Foundation – whose mission is to promote disciplined savings in financially challenged families through the use of one-on-one training and workshops aimed at improving financial well-being – and also helped spearhead Philadelphia’s inaugural *Financial Planning Day*. He was actively involved with the Philadelphia *Financial Planning Day* in 2011 as well.

“Dave selflessly serves the financial planning community. I believe his actions need to be recognized to set an example for all planners in our industry about what it truly means to serve for a greater good,” says a friend and former colleague.

Founder of The Pledging Tree Foundation, Prerna Singh, says: “It’s not very often you come across a person like Dave. His passion and energy for financial planning and financial education is extremely refreshing and contagious, and it creates an environment that draws the very best from his colleagues.”

Lessons Learned

- Go outside of the scope of your duties to make things happen
- Maintain a positive attitude and an enthusiasm that emanates in your work
- Mean what you say and deliver what you promise

Dave’s Leadership Portfolio

Dave served as the Pro Bono Director of his local chapter, Philadelphia/Tri-State Area, for three years. Although he has since stepped down from this role, he continues to be actively involved with the chapter. Dave has also provided service to various organizations and communities through the years, including Jewish Employment and Vocational Services, The Pledging Tree Foundation and The Consumer Credit Counseling Services Delaware Valley. He currently serves as Chairman of the Pledging Tree Foundation and was the 2010 Chair of the FPA Pro Bono Advisory Committee, a group of Pro Bono Directors from FPA chapters with active and successful Pro Bono Programs.