

Career Development - Daryl Wong, EA, CFP®

Wow, time sure flies when you're having fun. As I have wrapped up my first year of the Career Development Director, I have reflected on what we started with, what our goals were in 2019, and what we were able to accomplish during the year.

The Financial Planning Profession is not only continuously evolving, but it is also growing with new professionals entering the industry at a much faster rate than before. CFP curriculum is being introduced at major universities for a bachelor's degree, associate advisors are learning the ropes for equity ownership at firms, RIAs are consolidating, career changers are dabbling to pursue their personal finance passions, and offices are expanding and creating more opportunities for specialty roles and growth.

One of our main objectives for the Career Development role is to be a resource and provide guidance to those entering the business. We proposed speed mentoring events at the local universities, guest speaker panels to graduating students, internship/mentorship opportunities with local offices, and as always, maintained open communications and a warm atmosphere for any of our FPA members.

In all honesty, some initiatives were a success and some never gained momentum. The successful ones, though, were something we can be proud of. We successfully paired job seekers with employers, presented real-world advice to graduating students, and created many new connections.

We can all learn from our experiences so I will take this time to assess our progress and invest more time and resources to those that proved successful. As always, we encourage your ideas and suggestions to help us make a bigger difference to those entering the industry. After all, this next group may eventually be the leaders of the next generation of Financial Planning!