

Type*	Description	Requirements	Benefits (Includes that category & all below it)	Cost*
NAPFA-Registered Financial Advisor	Top level of membership	<ul style="list-style-type: none"> Hold the CFP® Certification Bachelor’s degree, in any discipline, from an accredited institution Submit a Comprehensive Financial Plan or participate in a Peer Review* Submit ADV Part 2 Complete 60 hours of NAPFA CE every 2 years 	<ul style="list-style-type: none"> Use of the “NAPFA-Registered Financial Advisor” logo Membership certificate suitable for framing Participation in NAPFA’s (Find An Advisor) Consumer Referral System 	Annual Dues \$665 Processing Fee \$150 **Reduced to \$75 if there is more than one NAPFA member with the firm
Retired Member	Long-standing NAPFA member no longer actively working with clients but wants to stay involved with the association	<ul style="list-style-type: none"> A NAPFA-Registered Financial Advisor becomes a Retired Member, cannot join as one Good standing for at least 5 years as a NAPFA-Registered Financial Advisor No NAPFA CE requirement No longer providing financial planning services to consumers 	<ul style="list-style-type: none"> Opportunity to network with like-minded professionals Discounts on products and services appropriate for a Fee-Only advisor A subscription to the <i>NAPFA Advisor</i> and <i>What’s New @NAPFA</i> Access to the web-based ENGAGE NAPFA “Community”, including our popular Discussion Forum where you can post questions, receive answers and stay on top of the issues facing fellow professionals 	Annual Dues \$200
NAPFA Associate	Fee-Only professional in a financial services or related industry (e.g. CPA, CFA, Attorney etc.) who is not eligible for any other category of NAPFA membership	<ul style="list-style-type: none"> Agree to the Fiduciary Oath and Standards of Membership and Affiliation If applicant is a Registered Investment Advisor, must submit Form ADV Part 2 	<ul style="list-style-type: none"> Use of the Fee-Only logo to show you're an advisor who doesn't accept commissions (if appropriate) 	Annual Dues \$425 **Processing Fee \$100 **Waived if there is already one or more NAPFA member with the firm
Academic Affiliate	Faculty member in a financial planning program (or other related field) at an accredited institution of higher learning	<ul style="list-style-type: none"> If employed by a financial services firm, must include Form ADV Part 2 Meet definition of Fee-Only 	<ul style="list-style-type: none"> The Online Membership Directory makes it easy to contact other members from around the country Reduced registration fees for NAPFA's acclaimed conferences and Webinars 	Annual Dues \$200 Complimentary for CFP® Program Directors
Student Affiliate	Individuals in pursuit of a degree or designation that will lead to a career in financial planning	<ul style="list-style-type: none"> Part-time students must meet the Fee-Only definition Full-time students may be exempt from above if paid or unpaid employment is in connection with a school related internship program Hold status for a maximum of 5 years If employed by a financial services firm, must include Form ADV Part 2 	<ul style="list-style-type: none"> Regional Education sessions via teleconferences and webinars Easy access to trends and hot topics impacting the growing world of Fee-Only comprehensive financial planning firms 	Annual Dues Part-Time: \$150 Full-Time: \$35

*Peer Review is a “discussion” of the applicant/firm financial planning process. This option covers the same material as the hard copy Comprehensive Financial Plan, but in a dialogue as opposed to being written down in a plan. Peer Reviewers also look at the applicant/firm website and marketing materials as part of the review.

**Membership categories and fees subject to change.

*** Individual members in a firm with 2 or more memberships receive a 25% discount off of their dues starting with their first renewal.

Corporate Membership Dues

Number of Professionals	1-5	6-10	11-50
Required number of NAPFA-Registered Financial Advisors*	1	2	2 plus 1 per every 5 additional professionals
Corporate Member Annual Dues	Firm: \$1,200 Per Professional: \$200	Firm: \$1,675 Per Professional: \$110	Firm: \$2,335 Per Professional: \$85

* One in every five members of the Corporate Firm, must be a NAPFA-Registered Financial Advisors