Outlook

Fw: Early Bird Pricing Ends Tonight

From David Bromelkamp <dbromelkamp@allodium.com>
Date Tue 9/8/2026 8:50 PM
To Kathryn Dattomo <dattomok@napfa.org>
Cc Michael Gibney <michaelg@moderawealth.com>; Natalie Pine <npine@briaud.com>
Bcc David Bromelkamp <dbromelkamp@allodium.com>; david@advisorsmart.com <david@advisorsmart.com>

I recently received NAPFA's email invitation to register for the 2026 NAPFA Fall Conference. I noticed that the email refers to **"fiduciary planning."**

I am confused by this terminology because NAPFA's Articles of Incorporation identify one of the organization's purposes as:

"To foster the practice of comprehensive, fee-only financial planning."

Can you please clarify whether the use of the term **"fiduciary planning"** reflects a deliberate strategic direction that has been approved or directed by the NAPFA Board of Directors?

If so, I would appreciate understanding when the Board made that decision, what "fiduciary planning" means, and how this terminology relates to NAPFA's stated corporate purpose of fostering **comprehensive, fee-only financial planning**.

If the Board has not directed management to pursue or promote a new concept of "fiduciary planning," then I assume this may simply be a communications or marketing error. If that is the case, it would seem to be a management issue that should be addressed so that NAPFA's communications accurately and consistently reflect the organization's stated purposes.

Given the importance of NAPFA's mission and identity, I believe members deserve clarity about whether this language represents an intentional change in organizational strategy or merely an error in the conference marketing materials.

I would appreciate a response from both the Board and management.

Thank you,

David Bromelkamp

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From: NAPFA Events <info@napfa.org>
Sent: Tuesday, September 8, 2026 1:20 PM
To: David Bromelkamp <dbromelkamp@allodium.com>
Subject: Early Bird Pricing Ends Tonight

Last Chance: Save Up to $400!

Early Bird pricing for the 2026 Fall National Conference ends tonight. Save $400 as a member or $300 as a non-member.

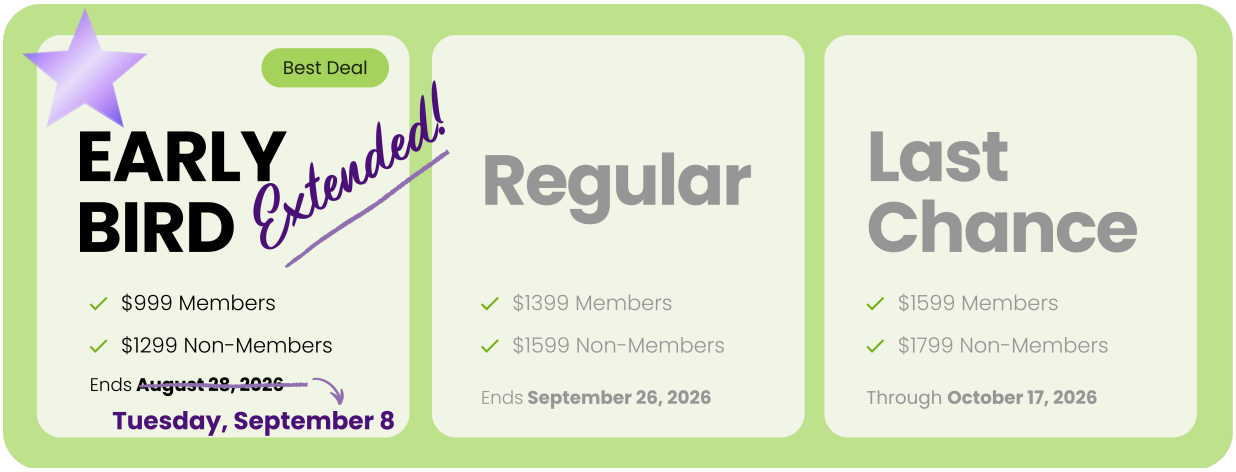
Register today to connect with Fee-Only financial planners from across the country for practical sessions, keynote conversations, and quality conversations.

- **Three keynote conversations** - Hear from Tim Maurer, George Kinder, and Dr. Carolyn McClanahan on client motivation, the future of fiduciary planning, and navigating uncertainty with clients.
- **Over 30 sessions to choose from** - Build a schedule around what matters most in your practice, with sessions covering tax and estate planning, practice management, client communication, business owner planning, and more.
- **Three Domains Workshop preconference** - Add a full day with George Kinder and Kathy Lubar exploring how fiduciary principles can shape the way you lead and grow your team.

From the preconference workshop to breakout sessions and keynote conversations, this year's agenda centers on ideas you can bring back to your practice right away.

Early Bird rates end tonight. Register now to lock in your rate.

Register Now



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