David Bromelkamp

From: David Bromelkamp
Sent: Friday, October 30, 2026 2:49 PM
To: 'bones@napfa.org'
Cc: 'michaelg@moderawealth.com'; 'npine@briaud.com'; 'bones@napfa.org'
Subject: NAPFA Engage Open Forum — Request for Explanation and Corrective Action
Attachments: Invitation to Meet with NAPFA Executive Committee - David Bromelkamp - Outlook.pdf; David Bromelkamp email to Kathryn Dattomo about NAPFA Engage Open Forum 011026.pdf

Dear Spencer,

I am writing to request a written explanation of the restrictions I have experienced when attempting to post to the NAPFA Engage Open Forum, and to ask how NAPFA protects members' ability to raise concerns about the organization's governance and leadership.

With your appointment as Interim CEO, there is an opportunity to resolve this matter and establish a more transparent approach to member participation. I am copying Michael Gibney as the current board chair and Natalie Pine as the former board chair because these questions concern both management practices and board oversight.

My experience raises concerns that remain unanswered:

- On January 2, 2026, Kathryn Dattomo invited me to meet with NAPFA's Executive Committee to discuss questions I had raised on Engage about NAPFA's governance and strategic framework.
- On January 9, 2026, I met with the Executive Committee and shared my concerns about NAPFA's direction and alignment with its founding purposes.
- On January 10, 2026, I attempted to create a new Open Forum post and could not. That afternoon, I emailed Kathryn asking whether this was a technology problem or whether there was another reason. I have not received a response to that inquiry.
- By August 17, 2026, I had again documented an inability to post, including an attempt to share a Kiplinger article about comprehensive, fee-only financial planning that favorably mentioned NAPFA.

The timing raises a concern that my participation was restricted because of my criticism of NAPFA's governance. However, I have not received an explanation establishing whether the problem involved a technical issue, account permissions, moderation, membership status, or another cause. I am asking you to clarify the facts.

Please respond to the following questions:

1. **What is the status of my account?** Can I currently create posts and reply to discussions in the Open Forum? Has my account been blocked, limited, or placed under advance moderation at any time since January 9, 2026? Please identify the dates and nature of any restrictions.
2. **Who made or authorized any restriction?** Please identify the individuals and positions responsible for requesting, approving, implementing, and reviewing any action affecting my participation.
3. **What was the reason?** If a restriction concerned my conduct or content, please identify the specific posts or actions involved, the applicable rule, and how that rule was violated. If the issue was technical or related to membership status, please explain when it arose and how it can be resolved.

4. **Why was I not given an explanation?** Was any notice sent to me identifying a restriction, its reason, its duration, and an appeal process? If so, please provide a copy. Please also explain why my January 10, 2026 inquiry went unanswered.
5. **What role has the board played?** Was the Executive Committee or board informed of, consulted about, or asked to approve restrictions on my participation or that of other members raising governance concerns? Please provide any relevant nonprivileged policies, decisions, or meeting records.
6. **What safeguards govern moderation?** Please provide the current Engage rules and moderation procedures, together with those in effect in January 2026. Please explain how NAPFA distinguishes respectful criticism of organizational decisions from prohibited personal attacks or other rule violations.
7. **How are the rules applied consistently?** What standards govern members sharing educational articles, including articles they authored? How does NAPFA ensure that members expressing concerns about leadership receive the same treatment as members expressing support?
8. **What options do affected members have?** Does NAPFA provide written notice, an opportunity to revise a post, and an impartial appeal before imposing or continuing restrictions? Who reviews complaints about moderation decisions made by staff or involving criticism of leadership?

I understand that an online community needs reasonable standards for professional conduct, privacy, and appropriate content. My concern is whether those standards are being applied fairly and whether members can question leadership decisions without losing access to an important member communication channel.

The Engage guidelines preserved in my records give NAPFA broad discretion to reject messages and direct certain organizational questions to staff. Please explain where members can openly discuss governance, strategic priorities, and management performance with one another if those discussions are restricted on Engage. A private inquiry to staff does not provide the same opportunity for member dialogue.

I ask that you review my account, correct any technical problem or unjustified restriction, and provide a clear written explanation of the outcome. I also ask NAPFA to establish a transparent process that gives affected members notice, a specific reason, an opportunity to revise content when appropriate, and access to an impartial appeal.

Please preserve relevant account-permission histories, moderation logs, submitted posts, and internal communications concerning these matters.

Please provide a written response by **November 13, 2026**. If additional time is needed, please acknowledge this request by that date and identify when I can expect a substantive response.

My objective is to restore confidence that members can participate, raise reasonable questions, and receive clear answers. An organization that promotes fiduciary responsibility should welcome scrutiny of its own governance and demonstrate accountability through its response.

Attachments:

- January 2, 2026 invitation to meet with the NAPFA Executive Committee
- January 10, 2026 email asking about inability to post to Engage

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