

# CFP BOARD CENTER FOR FINANCIAL PLANNING ANNOUNCES 2020 VIRTUAL DIVERSITY SUMMIT AND CAREER FAIR, AGENDA

October 20, 2020

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The CFP Board Center for Financial Planning today announced the agenda for its third annual [Diversity Summit and Career Fair](#), which will take place online from November 18-20, 2020.

The theme of this year's virtual Summit is "Sustainability," highlighting metrics-driven, long-term, diversity and inclusion (D&I) initiatives. Attendees will hear from high-profile keynote speakers, presenters and panelists who will spotlight actionable solutions to advance diversity in the financial planning profession.

"This year's Diversity Summit and Career Fair comes at a critical time in our history as we drive change, awareness, access and results in our profession," said CFP Board CEO Kevin R. Keller, CAE. "CFP Board is strongly committed to expanding and sustaining diversity in the financial planning profession and those it serves to better align with the U.S. population."

Highlights of this year's Summit include:

The release of a new thought leadership paper composed of a series of case studies from a select number of firms that outline their current initiatives aimed at increasing racial and ethnic diversity, and advice on how others can replicate and scale efforts to diversify their own workforces,

Case studies highlighting successes and challenges of D&I initiatives within and outside of the financial planning profession,

Actionable recommendations that firms can apply to their D&I efforts,

"CFP® Pro Talks" featuring personal reflections from CFP® professionals of color,

An Executive Roundtable highlighting firm leaders who are committed to D&I,

Discussion on the benefits of financial planning careers from diverse perspectives,

A Virtual Career Fair connecting diverse job seekers with financial planning employers.

The three-day event is tailored for executives and senior leaders at financial services firms, colleges and universities with financial planning programs, organizations led by and serving people and professionals of color, financial planning practitioners and students, and other D&I experts.

“The 2020 Diversity Summit will showcase best practices in organizational diversity and inclusion and inspire the industry to work together to make our vision of diversity a reality,” said Center Managing Director D.A. Abrams, CAE. “I guarantee we will spark connections, conversations, and implementable strategies and actions.”

Confirmed speakers include:

Bernie Clark, Executive Vice President and Head of Schwab Advisor Services, Charles Schwab

Frank Dobbin, Henry Ford II Professor of the Social Sciences, Harvard University

Sharon Epperson, Senior Personal Finance Correspondent, CNBC

Mellody Hobson, Co-CEO & President, Ariel Investments

Brian Lamb, Global Head of Diversity & Inclusion, JPMorgan Chase

Andy Sieg, Head of Merrill Lynch Wealth Management

Oris Stuart, Chief People & Inclusion Officer, NBA

Renee Tirado, Founder, VegaRobles Consulting; Former Chief Diversity & Inclusion Officer, MLB

Alicin Reidy Williamson, Senior Vice President, Chief Inclusion Officer, Endeavor.

The CFP Board Center for Financial Planning launched in 2015 with a vision to ensure every American has access to competent and ethical financial planning advice. This vision can only become a reality with a more diverse and sustainable financial planning profession. However, only 23 percent of CFP® professionals are women and only 3.8 percent are Black or Hispanic.

Through its annual Diversity Summit, the Center brings together firms, academic institutions, partner organizations and CFP® professionals in a collective effort to create a more diverse profession through research, case studies, best practices and actionable initiatives.

All Diversity Summit programming will be conducted virtually, with sessions held between the hours of 12:00 p.m. and 3:00 p.m., Eastern Time, November 18-20. The Virtual Career Fair will take place on November 20.

[Register for the Diversity Summit](#)

[Register separately for the Career Fair](#)

Thanks to the following sponsors, there is no cost to attend the Diversity Summit and Career Fair:

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