

CERTIFIED FINANCIAL PLANNER
BOARD OF STANDARDS, INC.

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Senior Public Policy Analyst

Summary:

Exempt position responsible for research, analysis, and writing in support of CFP Board's public policy and regulatory positions and activities.

Major Responsibilities:

1. Research and analyze issues, generally related to personal financial planning and financial services, in support of the public policy, advocacy and regulatory priorities of CFP Board;
2. Prepare policy, advocacy and regulatory documents (e.g., reports, analyses, position papers, presentations) that are consistent with policy positions developed by CFP Board;
3. Monitor and report on federal and state legislative, regulatory and policy activities related to personal financial planning and financial services;
4. Support direct and grassroots advocacy initiatives conducted by CFP Board before Congress and government agencies, including the preparation of advocacy documents and assistance with advocacy activities;
5. Support work with volunteer committees and task forces in the development of CFP Board policy positions on legislative and regulatory issues;
6. Manage the public policy / legislative sections of the CFP Board Web site and prepare public policy communications for CFP Board stakeholders.

Reports to: Managing Director, Public Policy

Job Knowledge and Position Requirements:

- Proven experience in research and analysis of public policy issues in support of legislative and/or regulatory initiatives;
- A minimum of five (5) years of relevant work experience;
- A bachelor's degree is required; a post-graduate degree in law, public policy or other relevant field (e.g., economics, securities, finance) is preferred;
- Excellent written and verbal communication skills;
- Strong organizational skills, ability to multi-task and ability to work collaboratively;
- Subject matter knowledge of financial planning, financial services, securities, tax, insurance and / or ERISA a plus.



CERTIFIED FINANCIAL PLANNER™

CFP®

Certified Financial Planner Board of Standards Inc. owns these certification marks in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Updated September 26, 2008

About CFP Board:

Certified Financial Planner Board of Standards, Inc. (CFP Board) has long been at the forefront of the movement to establish financial planning as a respected profession working in the public interest. With a mission to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for personal financial planning, CFP Board is a non-profit certification organization that establishes and enforces standards of professional financial planning in the U.S. CFP Board works to develop strategic partnerships with financial planning professionals and their employers, allied organizations, consumer advocates and others to advance the value of financial planning for the American public. More than 59,000 individuals currently hold CFP® certification, and the CFP® certification brand enjoys strong recognition by financial service professionals and consumers alike.

CFP Board completed its move from Denver to Washington, D.C. in December 2007. The move brings with it exciting employment opportunities for individuals who understand the value of financial planning and who have the talent and energy to help shape the ongoing development of CFP Board's mission. CFP Board's office in the nation's capital offers employees the unique chance to build on a legacy created over more than 20 years and move CFP Board toward operational excellence and increased influence.

CFP Board believes in providing equal employment and advancement opportunities to all individuals. Employment decisions at CFP Board are based on merit, qualifications, and abilities. CFP Board does not discriminate in its certification opportunities or business practices on the basis of race, color, religion, sex, national origin, age, disability or any other characteristic protected by law.