Florida Registered Program Summit Agenda

April 23-24, 2026

Day 1: Thursday, April 23

10:00 a.m.-12:00 p.m.	**Event: USF Student Case Competition** The University of South Florida will host a student financial planning case competition on the morning of the first day of the summit, open to all undergraduate students from universities participating in the event. If you would like more information, **please click here.**
2:00-3:30 p.m.	**Pre-summit session for RP Directors:** **Q&A discussion with CFP Board Education team** Topic: *Managing the Complexities: Administrative Challenges and Solutions in Registered Programs* This session dives into key operational and leadership issues facing program directors, including forming and leveraging advisory boards, securing faculty support, hiring and training qualified instructors, navigating academic leadership structures, and identifying sustainable funding sources.
4:00-4:15 p.m.	**Arrival of guests: Students, RP Directors, faculty, firms, others**
4:15-4:30 p.m.	**Welcome from USF Leadership**
4:30-6:00 p.m.	**Networking reception**
6:30–7:00 p.m.	**Cocktail hour**

7:00-9:00 p.m.	**Dinner for RP Directors and invited guests**

Day 2: Friday, April 24

9:00–9:50 a.m.	**Session A: Students**
	Q&A with CFP Board's Workforce team
	Topic: The Road to Certification
	Interactive session for students. CFP Board staff will break down the steps to meet the CFP® certification experience requirement and share practical strategies to help you succeed on the CFP® exam. Learn what types of internships and job roles qualify for experience, how to make the most of your early career opportunities, and how to build a study plan that sets you up for success. Bring your questions and walk away with clear, actionable guidance for moving confidently toward CFP® certification.
	Session B: Registered Programs and Firms
	Roundtable discussion led by CFP Board's Corporate Growth team
	Topic: Talent Pipeline Solutions and Workforce Readiness: Building Career Pathways for All Students
	This brainstorming session tackles the challenges in hiring and training diverse student populations, including military veterans and working students. The session will cover actionable solutions to enhance workforce readiness, streamline hiring practices, and create inclusive career pathways. It will also explore innovative strategies to strengthen the talent pipeline and ensure all students are equipped for successful careers in financial

	planning.
9:50–10:00 a.m.	**BREAK**
10:00-10:50 a.m.	**Session C: Students and Firms** **Networking event led by CFP Board's Workforce team** Build meaningful connections that can jump-start your career in financial planning. This networking session brings together undergraduate financial planning students and representatives from a variety of firms. Whether you're looking to practice your networking skills, learn what employers look for in emerging talent or simply start expanding your professional community, this session offers a welcoming environment to help you make valuable connections for the future. **Session D: Registered Programs and Faculty** **Roundtable discussion led by CFP Board's Education team** *Topic: Breaking Barriers: Navigating Enrollment Challenges and Growth Opportunities in FL Registered Programs* This discussion explores the barriers to program expansion and how to overcome them. It reviews strategies for engaging non-traditional students such as working professionals and veterans, aligning curricula with workforce demands, and strengthening the pipeline between academic programs and employment opportunities. Attendees will share insights and solutions to ensure that Florida's financial planning education ecosystem remains inclusive, resilient and ready to meet the profession's evolving needs.
10:00–10:50	**BREAK**

a.m.	
11:00 a.m.–12:00 p.m.	**Session E: Firms, Registered Programs and students** **Roundtable Discussion led by CFP Board's Education team** *Topic: The State of Financial Planning Education in Florida* This interactive session brings together firms, Registered Program leaders, faculty and students to examine the current landscape of financial planning education in Florida and its alignment with workforce needs. Discussion will focus on program growth, internship and experiential learning opportunities, workforce readiness, access for diverse and non-traditional students, and stronger collaboration between academia and industry. The goal is to identify key challenges, highlight what is working, and generate actionable ideas to strengthen Florida's financial planning talent pipeline.
12:00–1:30 p.m.	**LUNCH**
1:30–2:20 p.m.	**Session F: Registered Programs and Faculty** **Roundtable discussion on academic innovation led by CFP Board's Education team** *Topic: Integrating AI and other emerging technologies in the classroom* This forward-looking session explores how Registered Programs thoughtfully integrate artificial intelligence and emerging technologies into financial planning education. Discussion will highlight practical applications of AI in coursework, case analysis, research and client simulations; strategies for faculty adoption and training; and considerations around academic integrity and responsible use. Participants will

	share examples, challenges and innovative approaches to ensure graduates are technologically fluent and future-ready.
2:20–2:30 p.m.	**BREAK**
2:30–3:20 p.m.	**Session G: Registered Programs and Faculty** **Roundtable discussion led by CFP Board's Education and Volunteer Engagement teams** *Topic: Purpose, Practice and Pro Bono* This discussion is designed as an interactive discussion on the value of pro bono work within CFP Board Registered Programs, with emphasis on the Pro Bono Resource Library as a key resource for educators and students. Participants will review available tools and examples of how programs are incorporating pro bono opportunities. Program directors will explore challenges and discuss creative solutions related to completing the 500-hour experience requirement through pro bono service, sharing insights, successes and areas for improvement.
3:20–3:50 p.m.	**CLOSING**