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2025 President's Letter

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Katherine Davalos, CFP®

Dear Fellow Financial Advisors,

Happy New Year! While we're all working on New Years Resolutions, I want to reach out with my thoughts and hopes for the year.

As financial professionals, we understand that the way we view the world plays a crucial role in how we approach both our personal and professional lives. This is especially true when it comes to the financial services industry. Recently, I've been reflecting on how adopting an abundance mindset—believing that there is always more than enough success, knowledge, and opportunity to go around—has shaped my journey as a financial advisor.

An abundance mindset encourages openness, collaboration, and growth. It shifts the focus from competition to a mindset of contribution, where we support each other's growth rather than viewing one another as rivals. This mindset has been pivotal in both my personal and professional development and has profoundly impacted my approach to the financial planning process.

Several years ago, I took an important step in my career by becoming actively involved in the Financial Planning Association (FPA). It wasn't just about continuing my education or expanding my professional network—it was about embracing the power of collaboration and learning from the vast pool of expertise that exists within our community.

Participating in the FPA has allowed me to connect with other professionals who share my commitment to helping clients lead financially empowered lives. I've been able to engage in meaningful conversations, exchange ideas, and contribute to the broader conversation about the future of financial planning. Through this collaboration, I've realized that there's no shortage of knowledge, ideas, or innovation in our industry. The more we share, the more we all grow.



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An abundance mindset has led me to seek out these collaborative opportunities because I know that by learning from others and contributing to the collective success of the profession, we all benefit. The idea that helping my peers also helps me in return isn't just theory—it's been proven time and time again through my experiences in the FPA. Whether it's learning about new strategies, discovering new technologies, or simply sharing success stories and challenges, the value of collaboration is undeniable.

As financial advisors, we each have our own unique strengths, experiences, and perspectives. When we embrace the idea that there is enough room for all of us to succeed, we create an environment where we can all thrive—individually and as a profession.

This year, I encourage you to consider how embracing an abundance mindset might open doors for new opportunities and collaborations. Whether it's by joining the FPA, attending industry events, or simply reaching out to a fellow advisor to exchange ideas, there's a wealth of growth waiting for us when we choose to work together and support each other's journey.

Let's continue to lead with generosity, openness, and the belief that there's enough success to go around for all of us. I'm looking forward to a successful and thriving 2025!