



NEWS RELEASE

CFP Board Announces Two Key Leadership Promotions for Government Relations & Public Policy and Financial Planning Workforce Initiatives

WASHINGTON, D.C., November 29, 2023 — CFP Board is proud to announce the promotion of two staff members within the organization. Erin Koeppel, J.D., has been promoted to Managing Director of Government Relations & Public Policy, and Jason Gudenius, CDM, has been promoted to Managing Director of Workforce, overseeing Talent Pipeline, Future Financial Planner and Student Engagement initiatives.

“Erin’s extensive understanding of the intricate policy and regulatory landscape, as well as Jason’s innovative thinking on workforce development and certification growth, make them ideal for these roles,” said [CFP Board CEO Kevin R. Keller, CAE](#). “Their strategic leadership will advance our mission, amplifying our impact in policy and workforce development for the benefit of the entire financial planning profession.”

Since joining CFP Board in 2018, Koeppel has demonstrated her expertise as Deputy General Counsel – Adjudication and played a leadership role in several critical projects. As the lead counsel to the Disciplinary and Ethics Commission (DEC), she oversaw critical projects such as implementing CFP Board’s new *Procedural Rules*, designed to make the adjudication process more efficient, and managing the adjudication of increased enforcement actions.

Prior to joining CFP Board, Koeppel was a partner at K&L Gates LLP in Washington, D.C., where she represented financial services firms and individuals in navigating complex regulatory and enforcement matters. Koeppel earned her Juris Doctorate from Cornell Law School and her Bachelor of Arts in Political Science and Sociology from Ohio Wesleyan University.

Gudenius served as CFP Board’s Director of Marketing for six years. In his former role, he led the marketing team in developing and executing extensive marketing and engagement programs supporting tens of thousands of candidates for CFP® certification, annual certification renewals, and products and events. These successful programs focused on increasing access to, and the diversity of, competent and ethical financial planners and supporting current CFP® professionals. During Gudenius’ tenure, the number of CFP® professionals grew by almost 24%, nearing 100,000 CFP® professionals.

Before joining CFP Board, Gudenius worked as a Managing Director, Account Services at Marketing General Inc. (MGI), overseeing client strategy, new business development, account team training and program execution, including working on the CFP Board account. Gudenius

earned his Bachelor of Science in Marketing from the University of Maryland, College Park, and his Certified Direct Marketer (CDM) certification from Virginia Commonwealth University.

Maureen Thompson, former CFP Board Vice President of Public Policy, will remain a consultant for CFP Board, supporting public policy initiatives until Koeppel fully transitions into her new role following the identification of a candidate to lead adjudication.

#

ABOUT CFP BOARD

CFP Board is the professional body for personal financial planners in the U.S. CFP Board consists of two affiliated organizations focused on advancing the financial planning profession for the public's benefit. **CFP Board of Standards** sets and upholds standards for financial planning and administers the prestigious CERTIFIED FINANCIAL PLANNER™ certification — widely recognized by the public, advisors and firms as *the standard* for financial planners — so that the public has access to the benefits of competent and ethical financial planning. CFP® certification is held by nearly 100,000 people in the U.S. **CFP Board Center for Financial Planning** addresses diversity and workforce development challenges and conducts and publishes research that adds to the financial planning profession's body of knowledge.

CONTACT: Joseph Feese, Director of Public Relations, P: 202-379-2305,
E: media@cfpboard.org, Twitter: @CFPBoard

© 2023 Certified Financial Planner Board of Standards, Inc. All Rights Reserved.
1425 K Street NW #800, Washington, DC 20005
phone: 800-487-1497 (Toll-Free) / 202-379-2200 | fax: 202-379-2299 | media@cfpboard.org

[Unsubscribe](#)