

Financial Planning Resources

Tools to Help Educate Employees

CFP Board, a nonprofit, regulatory organization devoted to educating the public about the benefits of financial planning, has developed materials and resources for HR professionals to help inform employees about planning for their financial future. Regardless of the financial benefits your company offers, you can help your employees reach their goals by providing them with the facts about financial planning. Employers are discovering the benefits of promoting saving and investing – for college, marriage, children, credit card debt, aging parents, travel, illness, retirement, etc. – to their employees. Help give your employees a greater awareness of what they need to feel “in control” of their personal finances. Contact CFP Board and start educating your employees about the benefits of financial planning today.

Employees Want and Need Financial Planning Education

Two of the biggest barriers people face in successfully managing their personal finances are lack of knowledge and denial of the need to plan. You can help your employees overcome these obstacles by providing them with the education they need to secure a successful financial future. Employees welcome information about personal financial planning. In fact, more Americans are seeking help when it comes to financial planning. The best news is that providing this education in the workplace impacts an employee’s well-being and productivity, thus creating a win-win situation for everyone.

TOP REASONS for an Employer to Offer Financial Planning

- 1 Enhancing appreciation of existing benefits
- 2 Reducing fiduciary risk
- 3 Maximizing employee contribution
- 4 Attracting and retaining workers
- 5 Reducing stress & absenteeism resulting from financial problems

Source: Census of Certified Employee Benefit Specialists, New Kid on the Block, Financial Planning as an Employee Benefit, Survey Results December 2001.

FREE Tools and Materials

- * Financial Planning Resource Kits
- * Full-Color Workplace Posters
- * Black & White Fliers
- * Statement Stuffers
- * Newsletter Articles
- * Presentation Materials
- * Intranet Banner Advertisements
- * Web Site Links



CONTACT US

Go to www.CFP.net/HR

Call (800) 515-4990

E-mail consumerED@CFP-Board.org

CERTIFIED FINANCIAL PLANNER
BOARD OF STANDARDS, INC.

Internet/Intranet Marketing



Informative Articles

Got an employee newsletter? Go to www.CFP.net/HR to access articles to include in your newsletter, add to your Intranet site or send to employees via e-mail. Here are some examples of informative articles on various financial planning topics that you can distribute to your employees:

- * What You Should Know About Financial Planning
- * Common Questions About Financial Planning
- * Make Financial Planning Work for You
- * 10 Questions to Ask When Choosing a Financial Planner
- * Knowing Your Rights as a Financial Planning Client

Seminars and Presentations

Would you like to hold an in-house employee seminar or workshop on financial planning? CFP Board makes it easy:

- OPTION #1:** Go to www.CFP.net/HR to download a PowerPoint presentation and script that you can use at your next employee brownbag. The presentation will provide employees with a "big picture view" of what financial planning is, why it is important, and what to look for in a financial planner.
- OPTION #2:** For more information about planning a workplace seminar, call CFP Board at **(800) 515-4990**. A CFP Board volunteer or CERTIFIED FINANCIAL PLANNER™ professional in your area can be scheduled to speak at your next employee seminar or workshop.

Go to www.CFP.net/HR to access Web-based communications tools, including HTML code and links to be used on your Intranet or in employee e-mails. Internet banner advertisements can also be downloaded and used on Web sites to link to CFP Board's Web site, www.CFP.net/learn.

At www.CFP.net/learn Your Employees Can

- * Request FREE Financial Planning Resource Kits
- * Search for a CERTIFIED FINANCIAL PLANNER™ Professional
- * Find Links to Other Financial Planning Resource Web Sites
- * Get help for their financial situation
- * Participate in polls and quizzes

Financial Planning Resource Kits

The Financial Planning Resource Kit includes educational brochures such as "What You Should Know About Financial Planning," "10 Questions to Ask When Choosing a Financial Planner" and "Your Rights as a Financial Planning Client."

Your employees can request their FREE Kit by going to www.CFP.net/learn or calling **888-CFP-MARK (888-237-6275)**. Or, as an HR professional, you can provide Kits to your employees – simply call CFP Board at **(800) 515-4990** and request to have a number of Kits shipped to your office.

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