

CFP BOARD DIVERSITY INITIATIVE

CFP Board's mission is to foster professional standards in personal financial planning so that the public values, has access to and benefits from competent and ethical financial planning. In order to serve an increasingly diverse public, it is critical that our efforts address the changing demographics of the U.S. population.

Through ongoing collaboration with a number of nonprofit organizations, we are working to increase diversity in the financial services industry, and to promote economic empowerment in diverse communities. With the help of CFP® certificant volunteers throughout the country, CFP Board reaches a diverse audience of consumers, professionals and students with important information on the benefits of financial planning, related career options and the value of the CFP certification marks.

MAJOR MILESTONES

ING Alliance for Diversity in Financial Planning

ING U.S. Financial Services, Texas Tech University, a CFP Board-Registered Program, and Prairie View A&M University recently launched the ING Alliance for Diversity in Financial Planning. The alliance was designed to promote higher education opportunities for multi-ethnic and multi-cultural groups in the area of financial planning and to increase representation of these groups in the financial planning profession. The ING Alliance for Diversity in Financial Planning will leverage the resources and financial planning expertise of ING, Texas Tech University and Prairie View A&M University to provide new opportunities for advanced financial planning education especially at Historically Black Colleges and Universities (HBCUs).

Appearance on CNN en Español

CFP Board coordinated a television appearance for a Spanish-speaking CFP® certificant to discuss effective debt management on En Efectivo, CNN en Español's personal finance program. The program reached an audience of 14 million (2 million in the U.S.), and it was noted that the speaker was a CFP certificant.

Outreach to Historically Black Colleges and Universities (HBCUs)

Recognizing the importance of establishing educational pathways to careers in financial planning, CFP Board staff met with representatives from HBCUs in Savannah, Ga., to encourage financial planning program registration with CFP Board. The colleges and universities represented were Alabama A&M, the University of Arkansas at Pine Bluff, Fort Valley State, the University of Maryland-Eastern Shore, North Carolina A&T State, South Carolina State and the University of Tennessee.

Updated Financial Planning Curriculum for Diverse High School Student Population

A team of CFP® practitioners and academics reviewed the National Academy Foundation's financial planning curriculum. In addition to providing technical updates, the review team recommended Web resources and ideas to make the learning experience more interactive and relevant for high school students. Many of the recommended changes have been implemented, and are positively impacting the Academy of



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Finance (AOF) students. Approximately 20,000 students are enrolled in AOF programs nationwide, and the National Academy Foundation as a whole serves an ethnically diverse student population (36% African American, 22% Hispanic, 7% Asian/Pacific Islander).

Student Scholarships

CFP Board funds scholarships for student members of the Association of Latino Professionals in Finance and Accounting (ALPFA) and the National Association of Black Accountants (NABA). CFP Board also offers an annual scholarship to a National Academy Foundation high school student pursuing a career in financial planning/services.

GETTING INVOLVED

Become a Diversity and Education Outreach Volunteer

Learn about current volunteer opportunities by going to www.CFP.net/volunteers.