

From: CFP Board [mailto:mail@CFPBoard.org]
Sent: Wednesday, November 03, 2010 4:52 PM
Subject: CFP Board Proposed Public Awareness Campaign



CERTIFIED FINANCIAL PLANNER
BOARD OF STANDARDS, INC.

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Research conducted by CFP Board over the years consistently shows that most Americans are not aware of CFP® certification and many hold a negative perception of “financial planners.” However, recent research also shows that with a little education about CFP® certification, people demonstrate a significant shift toward a more positive understanding of and preference for CFP® professionals.

This is one reason why earlier this year the Board of Directors authorized CFP Board to conduct a study to determine the feasibility of a national campaign to increase awareness of the CFP® certification among the general public along with the possibility of a certification fee increase to pay for it.

Recently Bob Veres – a respected commentator, author and thought-leader in the financial planning profession – interviewed Chair Bob Glover, CFP® and me for a story about the Public Awareness Campaign and proposed fee increase. In his article that appears in the November edition of *Inside Information*, Mr. Veres notes, among other things, that the proposed Public Awareness Campaign conforms with our organization’s mission:

The way Glover and Keller see it, the proposal to start marketing the value of the CFP credential to the public is the opposite of a lack of transparency; it is a direct response to stakeholder feedback from the most public of forums. It also happens to conform with the Board’s primary mission in two ways. The Board’s charter is to benefit the public (by, in part, granting the certificate) and also upholding the CFP mark as the recognized symbol of excellence in the financial services universe.

I hope you will take a moment to read **the entire article**, which provides a good overview of the Public Awareness Campaign’s goals. It also answers many of the questions CFP® professionals have posed to us over the last several months as we have been on the road talking with certificants about our feasibility study and proposed Campaign. Additional details about the proposals are available from **the recording of our Virtual CFP® Certificant Connection Webinar** (aired on October 7, 2010) and our **Public Awareness Campaign fact sheet**.

The Board of Directors is expected to make a determination about whether to proceed with the Public Awareness Campaign at its November meeting. Board Chair Glover and I will report on the Board’s determination regarding the Public Awareness Campaign and on other issues at a Business Update Webinar on Wednesday, November 17, 2010 at 1:30 p.m. (Eastern Time). Please save the date and **register to attend the Webinar**.

Should you have any additional questions or comments, please contact us at feedback@CFPBoard.org.

Sincerely,

Kevin R. Keller, CAE
Chief Executive Officer

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