

CERTIFIED FINANCIAL PLANNER
BOARD OF STANDARDS, INC.

2008 | CFP Board's
Annual Firm Meeting



December 5 ■ Westin City Center, Washington, DC

Communications & Marketing

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Communications Objectives & Outcomes

Core Objective

Build the CFP® certification brand as the recognized standard of excellence in personal financial planning; promote its understanding and acceptance among the public and all other stakeholders.

Outcomes

- **The public understands, seeks and uses CFP® practitioners to achieve their life goals through proper management of financial resources.**
- **Stakeholders in each category recognize and value the benefit of their association with CFP Board.**

Communications


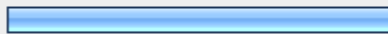

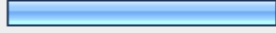
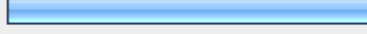
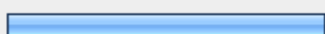

Role of Research

- **Public Policy research studies**
- **Annual certificant survey**
- **Annual consumer survey**
- **Pulse surveys for public release**
- **Target surveys for decision making**
- **Program evaluation surveys**

CFP Board Pulse Survey





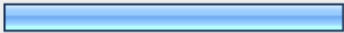

- **CFP® Certificants Views of the Current Economic Situation**
- **More than 5,000 CFP® Certificants Responded to Survey**
- **October 9 - 16, 2008**

CFP Board Pulse Survey

2. What actions are your existing clients taking? (Respondents were asked to select all that apply)			
		Response Percent	Response Count
Standing firm with existing strategies		77.5%	4165
Reviewing financial goals		47.6%	2559
Reviewing asset allocation		57.3%	3079
Rebalancing portfolio		33.6%	1806
Moving assets to lower-risk positions		45.2%	2431
Taking advantage of investment opportunities		39.7%	2135
Other actions		9.4%	503
		<i>answered question</i>	5377
		<i>skipped question</i>	63

Other actions cited by respondents included tax loss harvesting, going to cash to meet near-term needs and reassessing risk tolerance.

CFP Board Pulse Survey

3. What actions have you taken with your own personal financial plan? <i>(Respondents were asked to select all that apply)</i>			
		Response Percent	Response Count
Standing firm with existing strategies		78.2%	4239
Reviewing financial goals		12.7%	691
Reviewing asset allocation		20.4%	1107
Moving assets to lower-risk positions		9.4%	508
Taking advantage of investment opportunities		41.8%	2269
Other actions		5.2%	282
		<i>answered question</i>	5422
		<i>skipped question</i>	18

Other actions frequently cited by respondents included rebalancing portfolio, tax loss harvesting and reviewing discretionary expenditures.

Communications Key Stakeholders

- **Consumers/Public**
- **CFP® Certificants**
- **Financial Services Firms**
- **Policymakers**
- **Strategic Partners**
- **Education Providers**
- **HR Executives/Consultants**

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New Initiatives: Public

- **Consumer Media Relationships/Coverage**
- **Planner Search Feature/Links**
- **Strategic Partners (e.g. MHN, Myfinancialadvice)**
- **Financial Planning Clinics (Pro-bono)**
- **Website: written, audio and video content**
- **Advertising and special inserts**
- **Grants for research & sustainable programs**

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New Initiatives: Certificants

- **Town Hall Meetings**
 - A series of hosted events across the country

- **Business Update Forum Webinars**
 - On the Monday following each Board of Directors meeting

- **Referral Services**
 - Links on public sites to certificant search feature
 - Promotion of employer-based referrals

- **Marketing Collateral**
 - Advertising copy
 - Marketing brochures
 - News release templates

Communications

New Initiatives: Institutions

Firm outreach and collaboration

- **Brand positioning**
- **Pipeline to certification**
- **Employment and recruitment**
- **Data exchange**

And more!

Marketing Resources from CFP Board

Materials for those interested in CFP® certification:

- Guide to CFP® Certification booklet
- Steps to CFP® Certification flier

Materials available to all CFP® certificants through their online CFP Board accounts:

- Downloadable logo artwork
- Customizable marketing/advertisement templates
- Consumer-oriented brochures

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To request communication and marketing support materials, contact us at marketing@CFPBoard.org