

Let's Make a Plan – Talking Points

- **“Let’s Make a Plan” is an integrated Public Awareness Campaign that raises awareness of, intent to use and preference for CFP® professionals while stressing the value financial planning provides to individuals and families.**
 - Through our micro site, www.LetsMakeaPlan.org, the “Let’s Make a Plan” campaign offers consumers tools to find a CFP® professional in their area and gives them information and resources about financial planning.
 - The interactive and multi-faceted “Let’s Make a Plan” campaign reflects the CFP Board’s dedication to consumers. As a non-profit 501(c)(3) organization, CFP Board is here to benefit the public need.
- **As a CFP® professional, I’m here to serve consumers.**
 - As a CFP® professional, I received the personal satisfaction of obtaining the certification so that I can help my clients fulfill their financial goals.
 - My CFP® mark distinguishes me among my peers in the financial services industry as it shows that I have voluntarily met rigorous requirements of education, examination and experience and abide by CFP Board’s *Standards of Professional Conduct*, which includes agreeing to a fiduciary standard of care that places my clients’ interests first.
 - CFP Board enforces the professional standards for CFP® professionals like me, and misconduct leads to action by CFP Board that can include a letter of admonition, suspension or revocation of CFP® certification.
- **“Let’s Make a Plan” helps educate Americans about financial planning as a profession.**
 - The CFP® certification is a meaningful professional credential that continues to evolve and be strengthened by new education, ethics and examination requirements.
 - There are now more than 63,000 CFP® professionals in the United States, but according to the Bureau of Labor Statistics, there are more than 149,000 “personal financial advisors.”
 - It’s our mission for financial planning to be a recognized profession – and this campaign will help raise awareness of the profession.