CREATING A MORE DIVERSE AND SUSTAINABLE PROFESSION

BUILDING A TALENT PIPELINE

FOSTERING DIVERSITY AND INCLUSION

ADVANCED KNOWLEDGE FOR PRACTICE

OUR IMPACT: BY THE NUMBERS

66%
Increase in the number of CFP® professionals under 30 years of age since 2016

4,019
New women CFP® professionals since 2016 — a record-breaking 53% increase over 2013-2015

3,039
Black and Latino CFP® professionals in the workforce — more than double the growth rate of all CFP® professionals since 2017

As of August 2019
TALENT PIPELINE

THE CENTER IS HELPING CULTIVATE A QUALITY WORKFORCE TO ENSURE THE PROFESSION CAN RECRUIT AND RETAIN THE TALENT IT NEEDS TO GROW.

15,000 Downloads of guide to Financial Planning Career Paths in the publication’s first month

35 Scholarships awarded totaling over $170,000 with 4 scholars becoming CFP® professionals and 7 others in the final stages

92% Conversion rate of internships to full-time positions from first cohort of Financial Planner Re-Entry Initiative — published findings in a white paper

5,000 Job postings added to CFP Board Career Center, with over 23,000 job seekers and 3,000 employers

“I am very grateful to the donors of The Deena Jo Heide-Diesslin Scholarship and to the Center for Financial Planning for awarding me this scholarship. Financial planning will be a very rewarding career because I will be making a tangible impact on peoples’ lives by helping them achieve their life goals.”

– Sandra Cervantes, CFP® Owner, eParaplanner

“Developing clear career paths is crucial to the continued growth and development of the financial planning profession. The guide to Financial Planning Career Paths will be an important resource for employers and a game-changer for the advancement of the financial planner workforce.”

– Mark Tibergien
CEO, Advisor Solutions
BNY Mellon’s Pershing

CenterForFinancialPlanning.org
“The future of financial planning stands at a fork in the road. Will our profession rise to the responsibility of embracing diversity of fellow colleagues, clients and stakeholders? My vote is “Yes, we must” and attending the Diversity Summit is an actionable way toward understanding and committing to this responsibility!”

~ Trudy R. Turner, CFP®, CPA
Senior Wealth Manager
United Capital

“I love the opportunity to connect with people to learn about their goals personally, professionally, and financially. There is a cause and effect relationship to every decision our clients make, so providing them with the confidence that they are doing things right...is an amazing feeling.”

~ Matt Aaron, Jr., CFP®
“I am a CFP® Pro”
Campaign Spokesperson
Founding Partner, Aaron Financial

“As a practitioner, it was extremely valuable to attend the Colloquium and learn about the latest research in our field and the implications to practice. By bridging the gap between research and practice, the Center is advancing our profession and enabling us to provide the best advice to our clients.”

Sustainable, well-informed advice for a stress-free life.