

2026 CFP® Professionals Financial Outlook Survey

CFP BOARD

Another 38%
report their clients are
“somewhat” positive.



Half of CFP® professionals
report that clients have
a **positive** financial
outlook for 2026.

CFP® professionals' and clients' top discussion topics:

Political Climate



Inflation



Retirement



Top 3 Words Describing
CFP® Professionals' Clients' 2026 Feelings:

53%

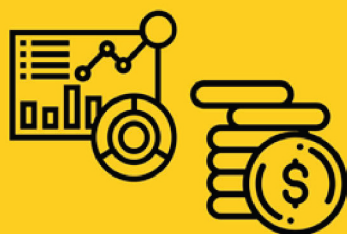
Cautious

43%

Uncertain

36%

Optimistic



4 in 5 CFP® professionals
say their clients are confident about
realizing their long-term financial goals.