



NATIONAL FINANCIAL PLANNING MONTH 2025

SOCIAL MEDIA TOOLKIT

Overview

October is National Financial Planning Month, a time to highlight the value of financial planning and the role of CFP® professionals. CFP Board has developed this toolkit to help you share the importance of financial planning with your clients, colleagues and community.

What's in the Toolkit

- **Sample social media posts** for LinkedIn, X, Facebook, TikTok and Instagram
- **Client-ready graphics** covering key financial planning topics
- **Hashtags** to use when posting
- **Weekly themes** to guide your outreach throughout October

Suggested Hashtags

- #FinancialPlanningMonth
- #FinancialPlanning
- #CFPpro
- #FutureCFPpro

Week 1: What Is Financial Planning?

Week 2: Basics of Financial Planning

Week 3: Careers in Financial Planning

Week 4: Taking Action

WEEK 1: WHAT IS FINANCIAL PLANNING?

BUILD AWARENESS AND INTRODUCE FINANCIAL PLANNING

Twitter/Instagram Posts

- Financial planning is about more than money. It's about setting goals, preparing for surprises and building a future you want. Learn more: <https://www.letsmakeaplan.org/getting-prepared/the-value-of-financial-planning>
- A CFP® professional looks at your whole life — your income, savings, debt, retirement and more — to build a plan that fits you. See why it matters: <https://www.letsmakeaplan.org/choosing-a-planner/why-choose-a-cfp-professional>
- Meeting with a financial planner for the first time? Bring your budget, account details and goals so we can turn information into a plan. Checklist here: <https://www.letsmakeaplan.org/getting-prepared/checklist-for-your-first-visit-with-a-financial-planner>
- Financial planning connects today's decisions — such as how much to save or spend — with tomorrow's goals. Start your plan now: <https://www.letsmakeaplan.org/find-a-cfp-professional>
- A financial plan is not just for retirement. It helps you at every stage of life — from paying for school to buying a home to planning for the future. Talk with a CFP® professional: <https://www.letsmakeaplan.org/find-a-cfp-professional>

LinkedIn/Facebook Posts

- October is National Financial Planning Month, a chance to explain what financial planning really means. It's not only about investments. It's about your whole financial picture — income, savings, spending, debt and future goals. As CFP® professionals, we help you organize your finances and prepare for the future. Learn more: <https://www.letsmakeaplan.org/getting-prepared/the-value-of-financial-planning>
- Many people wonder what to expect in a first meeting with a CFP® professional. Bring your budget, account details and personal goals. These basics help us turn a conversation into a clear financial strategy. Review the checklist and set up your first session: <https://www.letsmakeaplan.org/getting-prepared/checklist-for-your-first-visit-with-a-financial-planner>

WEEK 2: BASICS OF FINANCIAL PLANNING

EXPLAIN CORE BUILDING BLOCKS IN PLAIN LANGUAGE

Twitter/Instagram Posts

- Budgeting is knowing where your money goes. It's the first step to building confidence with your finances. Learn how to start: <https://www.letsmakeaplan.org/financial-topics/topics-a-z/budgeting>
- Saving is paying your future self. Even small amounts add up. Start with one step toward your goal today: <https://www.letsmakeaplan.org/financial-topics/topics-a-z/saving>
- Investing helps your money grow, but it's not one-size-fits-all. A CFP® professional can guide you to balance risk and return: <https://www.letsmakeaplan.org/financial-topics/topics-a-z/investing>
- Debt can feel overwhelming, but it's manageable with a plan. We help you set priorities for repayment while keeping savings on track: <https://www.letsmakeaplan.org/financial-topics/topics-a-z/debt-management>
- People who have a financial plan feel more confident and less stressed. Start building yours this month: <https://www.cfp.net/industry-insights/2025/06/a-cfp-professionals-impact-beyond-the-money>

LinkedIn/Facebook Posts

- The basics of financial planning are simple but powerful. Budgeting, saving, investing and managing debt are the building blocks of financial confidence. Even small, consistent steps add up over time. Work with a CFP® professional to start building your plan today: <https://www.letsmakeaplan.org/financial-topics/topics-a-z/budgeting>
- CFP Board research shows that people with a financial plan feel more secure about their future. As CFP® professionals, we look at your whole financial picture — not just one piece — to create a plan that fits your goals. Start or update your plan this October: <https://www.cfp.net/industry-insights/2025/06/a-cfp-professionals-impact-beyond-the-money>

WEEK 3: CAREERS IN FINANCIAL PLANNING

INSPIRE STUDENTS, CAREER CHANGERS
AND THE NEXT GENERATION OF CFP® PROFESSIONALS.

Twitter/Instagram Posts

- Financial planning is about more than numbers. It helps people gain confidence with their money. Learn why working with a CFP® professional matters: <https://www.letsmakeaplan.org/choosing-a-planner/why-choose-a-cfp-professional>
- Thinking about your future career? Financial planning combines people skills with financial knowledge. Explore how to become a CFP® professional: <https://www.cfp.net/why-get-certified/a-career-in-financial-planning>
- Students can start with a CFP Board Registered Program. These programs connect classroom learning to a career helping real people with their goals: <https://www.cfp.net/get-certified/cfp-certification-requirements/education/registered-programs>
- Career changers bring valuable life experience to financial planning. If you want meaningful work that impacts lives, learn about CFP® certification: <https://www.cfp.net/why-get-certified/a-career-in-financial-planning>

LinkedIn/Facebook Posts

- Financial planning is about more than numbers. As CFP® professionals, we help people feel confident about their financial choices — whether saving for college, buying a home or planning retirement. If you or someone you know is considering this profession, explore the CFP® certification pathway: <https://www.cfp.net/why-get-certified/a-career-in-financial-planning>
- The journey to CFP® certification is rigorous and rewarding. Education, exam, experience and ethics create the foundation for the profession. If you are a student or career changer, learn how this path prepares you to make a difference: <https://www.cfp.net/why-get-certified/a-career-in-financial-planning>

WEEK 4: TAKING ACTION

ENCOURAGE CLIENTS AND THE PUBLIC TO TAKE SMART FINANCIAL STEPS DURING NATIONAL FINANCIAL PLANNING MONTH.

Twitter/Instagram Posts

- Misinformation about money is everywhere. As CFP® professionals, we give you guidance based on training and ethics. Learn more:
<https://www.cfp.net/industry-insights/2025/07/in-cfp-professionals-we-trust>
- National Financial Planning Month is a reminder to check your goals. Has life changed? Update your plan and adjust your strategy. Start here:
<https://www.letsmakeaplan.org/getting-prepared/set-your-financial-goals>
- Looking for a financial planner? LetsMakeAPlan.org connects you with CFP® professionals who have met rigorous standards:
<https://www.letsmakeaplan.org/find-a-cfp-professional>
- Working with a knowledgeable professional makes a difference. Use this October to schedule a time with a CFP® professional and review your financial plan: <https://www.letsmakeaplan.org/find-a-cfp-professional>

LinkedIn/Facebook Posts

- October is National Financial Planning Month — a time to take action. Review your financial goals, update your plan and make sure your strategy reflects your priorities. Reach out to a CFP® professional today:
<https://www.letsmakeaplan.org/find-a-cfp-professional>
- Financial misinformation spreads quickly. As CFP® professionals, we are committed to giving clients ethical advice. Find a CFP® professional who can help you make confident choices: <https://www.letsmakeaplan.org/find-a-cfp-professional>
- Looking for a financial planner? LetsMakeAPlan.org connects you with CFP® professionals who meet rigorous standards for education, exam, experience and ethics. Visit today to find a professional near you:
<https://www.letsmakeaplan.org/find-a-cfp-professional>