CFP BOARD

FOUNDATION FOR FINANCIAL PLANNING℠

Powering Pro Bono Financial Planning

PRO BONO FINANCIAL PLANNING

A GUIDE FOR CFP® PROFESSIONALS

ADVANCING THE PRO BONO MOVEMENT

At CFP Board, we believe that our certificants have a unique opportunity to extend critical services to underserved and at-risk Americans in need of ethical and objective financial guidance. The Board of Directors recently approved a Resolution encouraging CFP® professionals to participate in pro bono financial planning. In the Resolution, CFP Board recommends that CFP® professionals commit to a minimum of 20 hours per year of pro bono service, and it also encourages firms that employ CFP® professionals to support them in their pro bono activities and efforts.

In recognition of the remarkable dedication of CFP® professionals who provide pro bono services, CFP Board has introduced digital pro bono badges. The digital badges will be awarded to individuals who have completed 20+, 60+, or 100+ hours of pro bono financial planning.

"In today's challenging economic environment, 63% of Americans are concerned about purchasing necessities. CERTIFIED FINANCIAL PLANNER™ professionals have the expertise to deliver critical financial planning services to underserved and at-risk Americans. That's why CFP Board is committed to expanding access to competent and ethical financial planners. Our Board of Directors recently passed a Resolution encouraging CFP® professionals to participate in 20 hours of annual pro bono financial planning and firms to support the pro bono efforts of their planners."

Kevin Keller, *CEO, CFP Board*

CFP BOARD FORMS FORMAL PARTNERSHIP WITH THE FOUNDATION FOR FINANCIAL PLANNING (FFP)

As we commit to advancing pro bono service across the profession, CFP Board is proud to partner with the **Foundation for Financial Planning (FFP)** — an independent charitable organization solely dedicated to this mission — to help make pro bono volunteer opportunities, training, and resources available to all CFP® professionals.

FFP has a track record spanning more than 25 years, during which time they have helped deliver free financial guidance to hundreds of thousands of people in crisis or need. Jon Dauphiné, CEO of FFP, has described CFP® professional volunteers as the "lifeblood of pro bono financial planning."

Join the pro bono movement!

WHAT IS PRO BONO FINANCIAL PLANNING?

CFP Board and FFP define pro bono financial planning as free, no-strings attached financial advice or guidance provided by or in conjunction with a CFP® professional volunteer for people who cannot afford a financial planner. Pro bono services can be delivered through either one-on-one or small group, interactive sessions.

Planners can connect to pro bono opportunities through FFP's volunteer matching platform, **ProBonoPlannerMatch.Org**, or through their local FPA chapter or NAPFA-organized event.

Planners may also identify pro bono volunteer opportunities in their local communities.

If you have any questions as to the many activities that qualify as pro bono, email us at probono@cfpboard.org

"Research on CFP® professional's professional development has shown that pro bono service bolsters both hard and soft skills across a myriad of issue areas and competencies, helping advisors to be more effective with both paid and unpaid clients. In today's war for talent, successful recruitment, engagement, and retention of advisors is an employer imperative. A firm that adopts policies and practices to encourage and support advisors doing pro bono service can position itself as an 'employer of choice,' gaining a human capital edge among all advisors and key diverse segments."

Jon Dauphiné, *CEO, Foundation for Financial Planning*

"The Case for Pro Bono," Foundation for Financial Planning, Sept. 2023

START YOUR PRO BONO JOURNEY TODAY!

Roadmap to Pro Bono Volunteering

1. Attend FFP's Free Training Course

This **FREE one-hour online course** is designed to give financial planners the skills and techniques to address the specific needs of lower-income individuals and families. This training course is approved for one CE credit by CFP Board. Advisors can also view FFP's free skill-building webinars on various pro bono related topics at **ffpprobono.org/webinars.**

2. Register for Pro Bono Planner Match

FFP helps CFP® professionals match with nonprofit organizations seeking pro bono financial planning assistance for their constituents through its national volunteer opportunity clearinghouse, **ProBonoPlannerMatch.Org**. There are many types of pro bono activities listed including virtual and in-person opportunities.

*Planners can also connect to pro bono opportunities through another nonprofit organization; or through their local FPA chapter; or NAPFA-organized effort or on a more informal basis with underserved members of their community.

3. Report your Pro Bono Hours

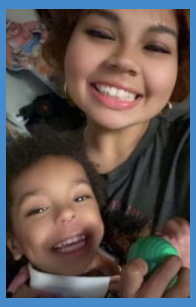
Log into your **CFP.net account** and report your volunteer hours to CFP Board. Not only can you report hours from this year, but you can report your pro bono hours from the prior two years as well. While you're there, be sure to sign up for the quarterly Pro Bono Newsletter!

Additional Resources

- Eligible CFP® professionals who have taken FFP's training course and who connect with a pro bono opportunity through **ProBonoPlannerMatch.Org** or volunteer with any of FFP's grantees are automatically covered by FFP's E&O Liability Insurance.
- This **Compliance FAQ** prepared by FFP and it's pro bono compliance advisor, MarketCounsel, will help answer any questions your compliance department may have.

REAL STORIES

These stories are from real clients and volunteers within FFP's funded programs. These stories and many more can be found at **ffpprobono.org/our-impact.**



"If I hadn't been introduced to Britepaths and my planner Enjoli, I honestly think I would be homeless. This program literally saved me."

–**Xena,** *pro bono client*

Read Xena's story **here**

"Volunteering has inspired, energized, and fulfilled me. I'm so grateful to FFP for the opportunity to meet the clients I work with and to have a meaningful impact on their lives."

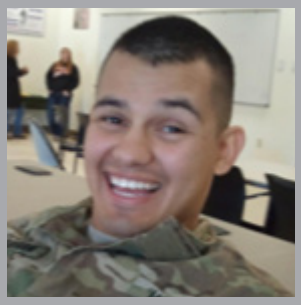
–**Kevin,** *pro bono volunteer*

Read Kevin's story **here**

"Absolutely do it. It's one of the best ways you can use your time and talent as a financial planner."

–**Jessie,** *pro bono volunteer*

Read Jessie's story **here**



"I feel a big weight off my shoulders... I am a single father of three; to be able to have my finances in order and not have to worry, that is the biggest thing."

–**Michael,** *pro bono client*

Read Michael's story **here**

To learn more about the Foundation for Financial Planning, go to **FFPprobono.org.**

I do pro bono because...

CFP.NET/PROBONO #PROBONOMONTH

What motivates you to be a pro bono volunteer?
Please take a moment to email us so we can share your story!

probono@cfpboard.org

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