

CREATING A MORE **DIVERSE & SUSTAINABLE PROFESSION**



**BUILDING A
TALENT PIPELINE**



**FOSTERING
DIVERSITY, EQUITY
AND INCLUSION**



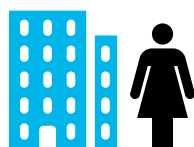
**ADVANCING
KNOWLEDGE
FOR PRACTICE**

OUR IMPACT: BY THE NUMBERS



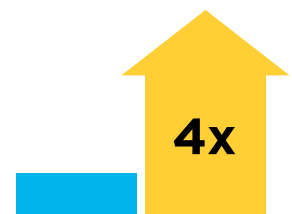
93%

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



21,504

Total women CFP® professionals, representing a 4.2% increase over 2020 numbers



4,196

Black and Hispanic CFP® professionals at the end of 2021, nearly 4x the growth rate of all CFP® professionals during the year

TALENT PIPELINE

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



\$800K+

Awarded in scholarships to support aspiring CFP® professionals since 2016



100%

Increase in scholarship programs offered, for a total of 10, resulting in a record 80 new awards issued in 2021



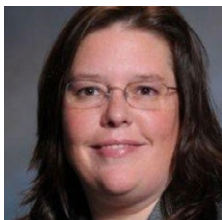
21K+

Views and downloads of the 2021 *Guide to Careers in Financial Planning*, a first-of-its-kind resource for students and career changers on how to start and sustain a successful career in financial planning



900+

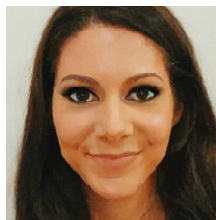
Jobs and internships added to the CFP Board Career Center in 2021



Kathy Tague

Senior Director, Talent Acquisition & Onboarding—Field Talent, Northwestern Mutual

“Northwestern Mutual is proud to partner with the Center for Financial Planning and work to address the current and future needs of the profession.”



Anissa Labyad

Student, New York University, 2020 Scholarship Recipient

“Receiving the Facet Wealth Scholarship for Increased Diversity in Financial Planning has been fundamental to my career success. With the help of Facet Wealth, I greatly look forward to becoming a CERTIFIED FINANCIAL PLANNER™ professional with a diverse perspective and a commitment to provide all families with access to high quality financial advice.”

DIVERSITY, EQUITY & INCLUSION

THE CENTER IS FOSTERING
A MORE DIVERSE FINANCIAL
PLANNER WORKFORCE THAT
REFLECTS THE CHANGING
DEMOGRAPHICS IN THE
UNITED STATES.



CLOSE TO

900

Attendees participated
in our fourth annual
Diversity Summit,
held virtually over
2 days in 2021



88%

Rate of respondents
who indicated they would
attend Diversity Summit
again. 68% have an
actionable recommendation
to implement at their
organization



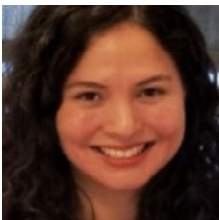
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DEI Forums convened
with leading practitioners
who presented actionable
recommendations to drive
tangible and measurable
impact across the
profession



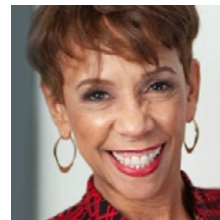
294

Job seekers
connected with
43 employers at the
Diversity Career Fair
focused on women
and people of color



Melanie Kahrs, CFP®
Wealth Manager,
Campbell Wealth
Management

“I applaud the CFP Board Center for Financial Planning for stepping up the focus on diversity, equity, and inclusion within an incredibly rich summit and also asking everyone to take action and bring the tactics and strategies to our firms. The complexion of our planning base when it comes to race/gender/sexual orientation already does not reflect the communities that we serve, and we need to take action as we owe it to our collective future.”



René Nourse, CFP®
Founder/CEO,
Urban Wealth
Management

“The role and goal of the WIN Advocate program is to share the importance and the need for women to be in this industry to provide service and oversight, since women tend to be overlooked and underserved. By having women CFP® professionals share their experience, the value, and the significant impact they are providing their clients, it will help to bring more females in.”

KNOWLEDGE FOR PRACTICE

THE CENTER IS ELEVATING
FINANCIAL PLANNING AS
A RECOGNIZED ACADEMIC
DISCIPLINE IN COLLEGES
AND UNIVERSITIES.



127K+

Cumulative downloads of the *Financial Planning Review*, including 4 new installments published with a highly selective acceptance rate of 10% in 2021



703

Leading academicians, researchers and practitioners convened at the fifth annual Academic Research Colloquium in 2021—a 466% increase in attendance from last year's event



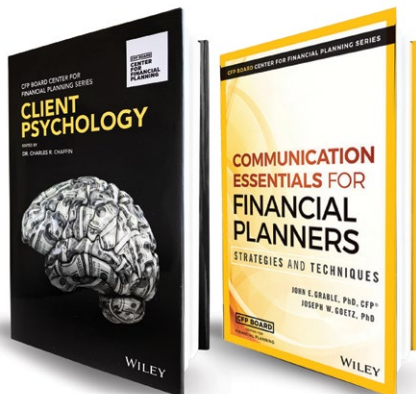
28

Original research papers were presented at the Colloquium in 2021, surpassing other academic conferences in financial planning. 7 best paper awards and 27 research posters were also presented



3

Sessions of the Client Psychology Program with The Wharton School were offered, to help financial planners develop a more client-centered practice, drawing 110 attendees



2

Volumes added to our book series, expanding the profession's body of knowledge: *Client Psychology* (2018) and *Communications Essentials for Financial Planners* (2017).



Kimberly Beck
Senior Vice President,
Marketing, Investnet

“Investnet is proud to be a Founding Sponsor of the Center for Financial Planning. We believe this partnership has played an invaluable role in diversifying and equipping the next generation of financial planners and elevating our industry to meet the growing consumer demand.”

Make your tax-deductible gift today to help shape the future of the financial planning profession.