



Call for Nominations Registered Program Excellence in Pro Bono Award

CFP Board and the Foundation for Financial Planning are proud to release the call for nominations for the 2nd Annual Registered Program Excellence in Pro Bono Award. The award recognizes one CFP Board Registered Program for making significant contributions to pro bono financial planning while providing exceptional experiential learning opportunities to students. The winning program will receive a \$5,000 grant to use for future pro bono activities. **The award recipient will be announced at the CFP Board Registered Programs Conference in March 2020 in Washington, D.C.**

Eligibility Guidelines

- Nominated programs must be registered with CFP Board for the entire 2019 calendar year and remain registered in good standing in March 2020.
- Pro bono activities must involve students from CFP Board Registered Programs providing pro bono financial planning to underserved members of the community during the period of January 1, 2019 to December 31, 2019.
 - CFP Board and the Foundation for Financial Planning define pro bono financial planning as: *Free, no-strings-attached financial advice and planning for underserved people* provided by or in conjunction with a CFP® professional volunteer. Services will be delivered through one-on-one engagements or through interactive group sessions on topics specific to an at-risk audience, with the option for personalized engagement to follow.*
- Past Pro Bono Award recipients are not eligible to apply for a period of three years after winning the award.

* *Low-income individuals and families, military personnel/veterans, domestic violence survivors, people affected by natural disasters, serious medical crises, bankruptcy, etc.*

Nomination Requirements

- Respond to all questions/prompts below in no more than 500 words each.
- Entries must be received no later than **December 31, 2019**.

Nomination must include:

School Name	Contact Name
Registered Program Name	Contact Email Address
Pro Bono Activity Name	Contact Phone Number

1. Description of the pro bono activities. (*Please refer to the definition of pro bono financial planning above*). When describing each pro bono activity, include detail on when your program began engaging in it and how frequently it occurs.
2. Number of pro bono activity hours completed by the program in the past year.
3. Estimated number of one-on-one sessions for pro bono clients that occurred in the past year.
4. Number of students who participated in each pro bono activity in the past year.
5. Description of the involvement of program faculty and staff in each pro bono activity.
6. Description of the impact of each pro bono activity on the community.
7. Description of the impact of each pro bono activity on the participating students.
8. Description of a successful pro bono financial planning situation with a client.

Nominations and any supporting documentation should be submitted to registeredprograms@cfpboard.org no later than December 31, 2019.