

HOW CFP® PROFESSIONALS GIVE BACK TO THEIR COMMUNITIES

CFP BOARD

WHAT IS A CFP® PROFESSIONAL?

CERTIFIED FINANCIAL PLANNER® professionals are financial experts who have met rigorous training, education and ethical standards set by the Certified Financial Planner Board of Standards, Inc. CFP® professionals help people manage their finances in a variety of areas, including retirement, investing, education, insurance and taxes.

As part of their certification, CFP® professionals make a commitment to CFP Board to act as a fiduciary in serving all clients — both paid and pro bono.

In 2022, CFP Board formalized our partnership with the Foundation for Financial Planning (FFP), an independent charitable organization solely focused on expanding pro bono service in the financial planning profession by helping make pro bono volunteer opportunities, training and resources available to all CFP® professionals. We are thankful to the thousands of CFP® professionals that volunteer each year to make financial planning services accessible to more people!

2024 PRO BONO BY THE NUMBERS



17%

CFP® professionals engaged in pro bono volunteering in 2024



16%

increase in the number of CFP® professionals who engaged in pro bono from 2023 to 2024



17,916

CFP® professionals reported pro bono service in 2024



877

CFP® professionals participated in six pro bono training webinars



6,311

CFP® professionals volunteered 20 or more hours



389,435

pro bono hours reported in 2024

WHAT TYPES OF FINANCIAL TOPICS DO PRO BONO VOLUNTEERS HELP WITH?

- Budgeting
- Managing debt
- Planning for college
- Saving for retirement
- Setting and prioritizing goals
- Avoiding scams and predators
- Building an emergency fund
- Managing finances through a critical illness or other emergencies
- Improving credit scores
- Buying a home
- Creating or assessing a household budget
- Navigating employee and government benefits

WHERE DO CFP® PROFESSIONALS VOLUNTEER? SOME EXAMPLES INCLUDE:

AARP, Angel Foundation, Black Connect, CancerLINC, Eden Housing, Friends of the Miami-Dade Public Library, Homes For Our Troops, Project Sanctuary, Wings for Widows, WISE, Women's Money Matters and many more.