



Overview of the Foundation for Financial Planning (FFP)

+ Why Pro Bono is Good for You and Your Business

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FOUNDATION FOR[®]
**FINANCIAL
PLANNING**

Powering Pro Bono Financial Planning

WHY PRO BONO FINANCIAL PLANNING?



BECAUSE **MILLIONS** OF AMERICANS NEED
BUT CAN'T ACCESS QUALITY, ETHICAL
FINANCIAL ADVICE.

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How Do We Do It?

FFP is dedicated to helping people in need improve their financial lives by expanding access to pro bono advice and planning. Over our 28 years, we have helped mobilized over 27,000 CFP[®] professionals as volunteers and granted over \$9M in funding to pro bono programs, reaching over 715,000 people in crisis or need with free financial guidance.

How do we do it?

1. **Provide grants** to nonprofits to develop and grow pro bono financial planning programs for the people they serve
2. **Connect financial planners to pro bono opportunities** through our volunteer platform, ProBonoPlannerMatch.Org
3. **Develop signature programs** for national reach, like our Financial Planning for Cancer and Retirement Resilience programs
4. **Offer free pro bono training and resources** for volunteers
5. **Raise awareness** of the importance and impact of pro bono service

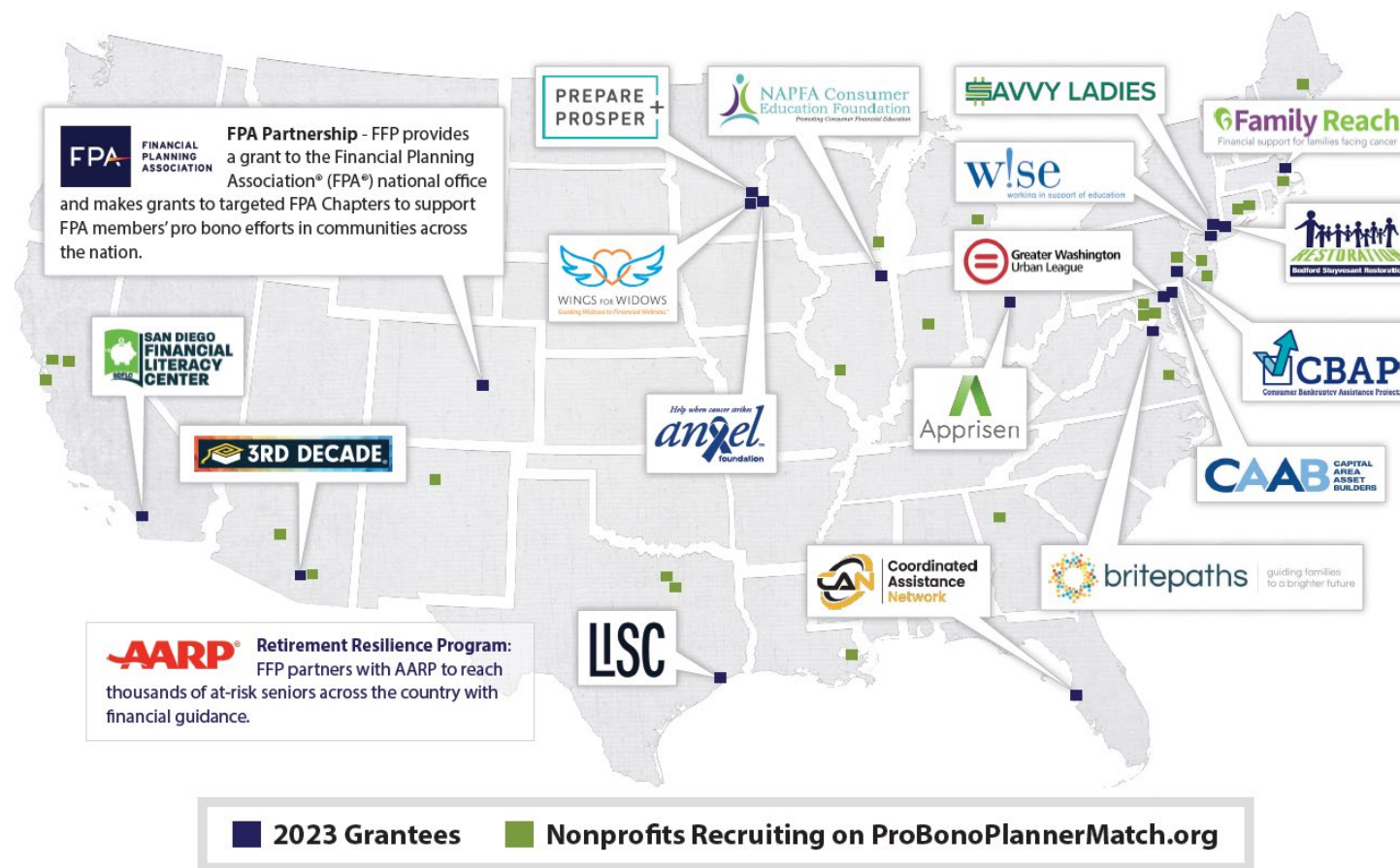
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Expanding access to expert financial advice

Who benefits from FFP's programs?

- Military and veterans
- At-risk seniors
- Underserved women
- Families facing cancer

... and many more



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ProBonoPlannerMatch.Org

- Over 2,000 CFP® professional volunteers and 115 nonprofits have registered to date.
- Currently, over 50 different types of opportunities are posted.



FOR VOLUNTEERS

FOR NONPROFITS

TRAINING AND RESOURCES

BROWSE OPPORTUNITIES

LOGIN

SIGN UP

ProBonoPlannerMatch.Org

An initiative of Foundation for Financial Planning, **ProBonoPlannerMatch.Org** connects CERTIFIED FINANCIAL PLANNER™ professionals to pro bono opportunities nationwide, making it easier than ever for families in need to access free, quality financial advice.



Any CFP® professional can create a profile, browse opportunities, and sign up to volunteer today!

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Advancing the Movement

CORPORATE 100 CLUB



BlackRock



CAIS



RIA IMPACT PARTNERS



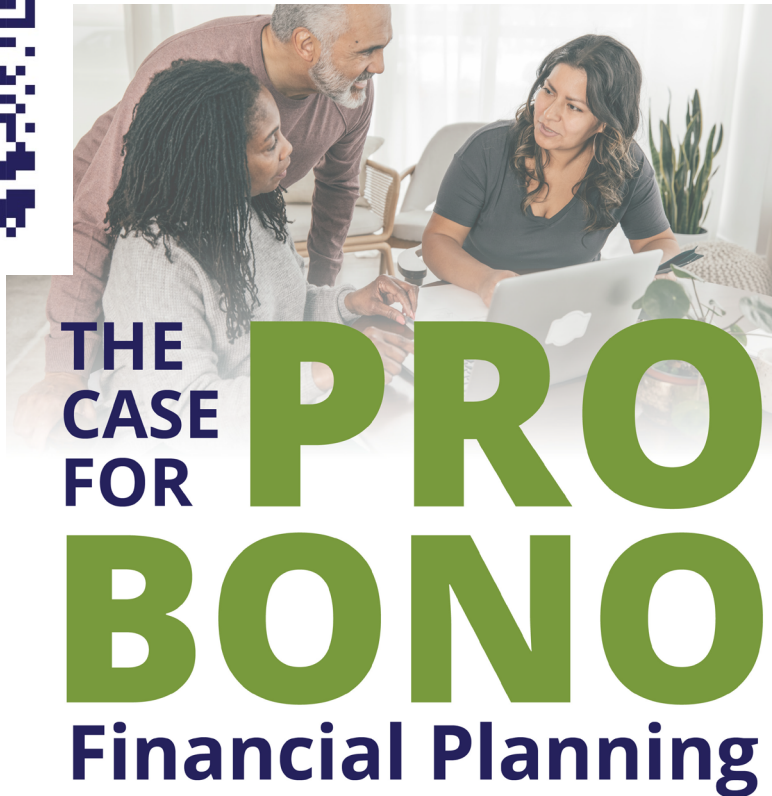
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“The Case for Pro Bono Financial Planning”



*The most comprehensive study
ever done on CFP[®] professionals
and pro bono service*

+ Why employers should care

by Jon Dauphiné, CEO

Foundation for Financial, September 2023

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The Business Case

Firms Encouraging Pro Bono Gain Competitive Edge

Pro Bono Influences Employer Choice

Would a firm's encouraging policy on pro bono make you more likely to work there?

It would make me **MORE LIKELY**
to want to work there



46%

55%

55%

My current firm has an
ENCOURAGING POLICY



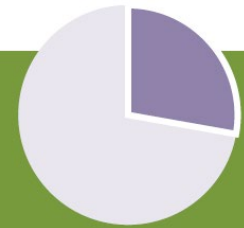
28%

21%

29%

● All CFP® professionals ● Under age 35 CFP® professionals ● Female CFP® professionals

Only
28%
of CFP® professionals
report that their
firm **encourages
pro bono**



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The Business Case



70%

OF CFP[®]
PROFESSIONALS
AGREE WITH
THIS STATEMENT:

“In the legal field, many leading law firms actively encourage pro bono service for those in need. *Financial advisory firms should likewise encourage and support advisors who provide pro bono service.*”

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The Business Case

How Firms Can Advance Pro Bono Service: Policies and Practices to Support Pro Bono

CFP[®] respondents want employers to better support their advisors who perform pro bono service, saying firms should:

ALLOW ADVISORS TO USE SOME OF THEIR WORK HOURS to engage in pro bono service

67%

76%

HAVE PARTNERSHIPS WITH NONPROFIT ORGANIZATIONS who lead the pro bono movement

59%

65%

TAKE CARE OF ALL COMPLIANCE-RELATED ISSUES and/or front-run pro bono compliance on their advisors' behalf

67%

75%

TAKE POSITIVE NOTICE OF PRO BONO SERVICE during performance reviews

52%

56%

- All CFP[®] professionals
- Under age 35 CFP[®] professionals

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The Professional Development Case

Pro Bono Service Develops Key Advisor Skills

Advisors Agree that Pro Bono Service Develops Key CFP® Principal Knowledge Topic Skills



And much more.

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The Professional Development Case

Advisors Apply “Soft Skills” from Pro Bono in Broader Careers

Advisors Agree that Pro Bono Service Develops Soft Skills They Use in Broader Careers

Pro bono financial planning has helped me develop more effective **CLIENT LISTENING AND COMMUNICATION SKILLS**.



The opportunity gained through pro bono financial planning to **INTERACT WITH A MORE DIVERSE CLIENT BASE** makes me more effective as an advisor.



Pro bono financial planning allows me to take on new roles and **DEVELOP SPECIFIC LEADERSHIP SKILLS** that I can apply with paid clients and/or in my broader career.



● % of CFP® professionals who agreed
● % who strongly agreed

● % of under age 35 CFP® professionals who agreed
● % who strongly agreed

81%
of CFP® professionals
under age 35
said pro bono
**improved
communications
skills.**



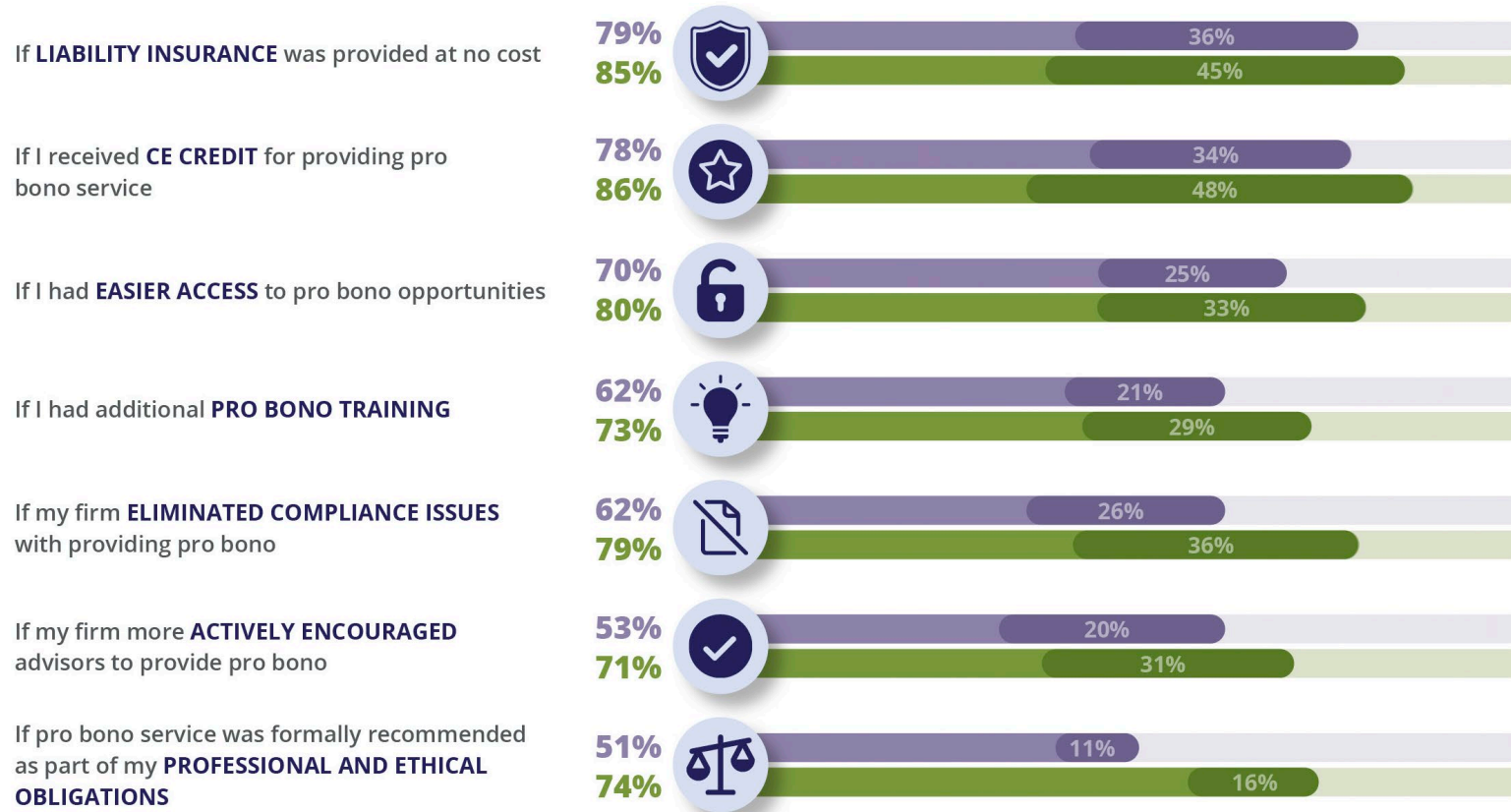
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Setting the Stage for Pro Bono Service

CFP® Professionals On: What Would Increase Your Likelihood of Providing Pro Bono Service?



● % of CFP® professionals who said
would increase likelihood
● % who said would strongly increase

● % Under age 35 CFP® professionals saying
would increase likelihood
● % who said would strongly increase

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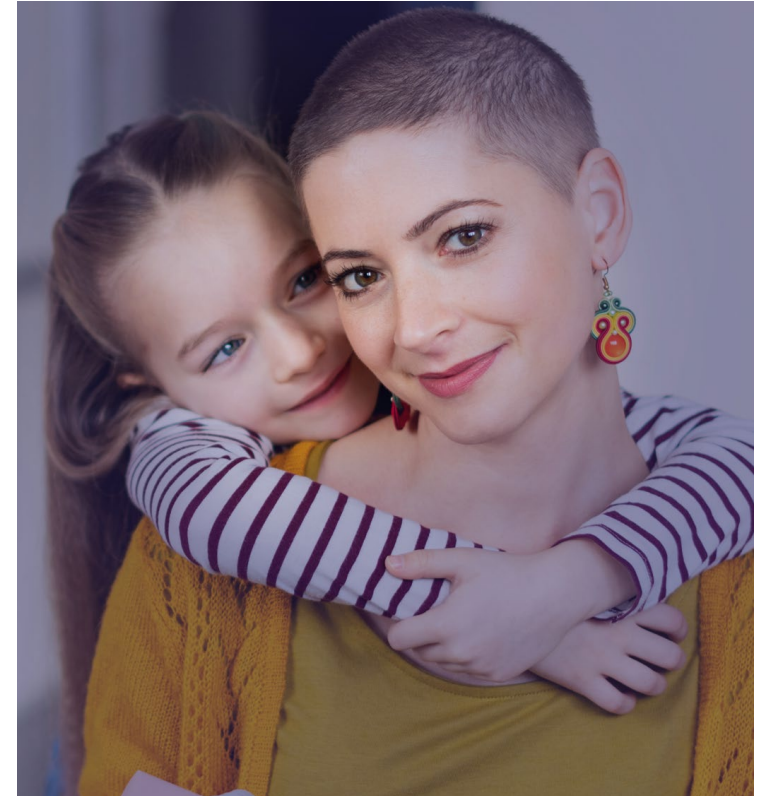
How You Can Get Involved

Sign up to volunteer:

ProBonoPlannerMatch.Org

Make a donation:

FFPprobono.org/Donate



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