

Building a Profitable and Purpose Driven Business

Resources and Organizations to Help Amplify Your Purpose

Being a purpose-driven business is quickly becoming more than just a nice to have, but a business imperative, with consumers and employees demanding that companies they do business with, or work for, have a higher purpose than just profits.

Leading and growing a purpose-driven wealth management business is a calling and requires a strong commitment over the long-term.

Here are several resources and organizations dedicated to helping financial advisors lead with purpose and amplify their impact. You may find new ideas to help you identify opportunities no matter where you are on your journey as a purpose-driven business leader.

Industry Organizations

Foundation for Financial Planning

- FFP makes it easy for CFP[®] professionals to engage in pro bono service. Create a profile and browse pro bono opportunities today at ProBonoPlannerMatch.Org.
- FFP's pro bono initiatives would not be possible without charitable support from financial advisors and firms. Make a tax-deductible contribution today at FFPprobono.org/donate.
- FFP's inaugural *The Case for Pro Bono Financial Planning* report offers a detailed look at the views of financial advisors on pro bono service. Rooted in a survey of almost 1,200 CFP[®] professionals, the research reveals a compelling case for pro bono financial planning with strong moral, business, and professional development underpinnings.

TO LEARN MORE

visit ffpprobono.org
or call **202-864-5183**

The American College of Financial Services

- Chartered Advisor in Philanthropy[®] (CAP[®]) Program enables advisors to fuel their career with specialized expertise to help clients identify philanthropic intent and maximize their legacy for lasting impact. There are three courses to complete and typical completion time is less than 12 months.
- [The American College's Center for Philanthropy & Social Impact](#) fosters an open and inclusive space for advisors and donors to engage in social impact.

TO LEARN MORE

visit TheAmericanCollege.edu/CAP or call **866-640-2210**

CFP Board Center for Financial Planning

- The Center is an initiative of CFP Board to create a more diverse and sustainable financial planning profession so that every American has access to competent and ethical financial planning advice. Advisors can get involved with the Center in a number of meaningful and rewarding ways.

TO LEARN MORE

visit cfp.net/cfp-board-center-for-financial-planning
or call **800-487-1497**

Invest in Others

- Invest in Others has several programs that provide an opportunity for those working in the financial services industry to secure funding for specific programs or projects on behalf of a nonprofit that they support.

TO LEARN MORE

visit investinothers.org
or call **781-304-4812**

Tools & Resources

Conscious Capitalism Field Guide

The Conscious Capitalism Field Guide — the authoritative follow-up to the bestselling book *Conscious Capitalism*, by John Mackey, CEO of Whole Foods Market, and leadership expert Raj Sisodia — gives you the tools for sharing and implementing the principles of higher purpose and conscious business throughout your organization. Available at book stores and via [Amazon.com](https://www.amazon.com).

Crucial Donors: How Major Individual givers can best support nonprofits

Buteau, E., Martin, H., & Loh, C. (2019, September) *Crucial Donors: How Major Individual Givers Can Best Support Nonprofits*. The Center for Effective Philanthropy.

Seth Streater | Future of Wealth

sethstreater.com/future-of-wealth/

Thrivent Advisor Network Generosity Programs

Compassion is at the heart of how Thrivent Advisor Network and our affiliated advisory businesses lead and serve. TAN offers the following benefits to affiliated advisors so they can support the communities and causes that are important to them:

- Eligible for up to \$10,000 per year to host community events to lift up and give back.
- Access to Thrivent resources to lead fundraising and volunteer events.
- Volunteer and training opportunities to provide pro bono financial planning via our partnership with the Foundation for Financial Planning

TO LEARN MORE

visit thriventadvisornetwork.com

or call 612-844-8444

We believe financial advisors are in a unique position to help change lives, give people hope and have a positive impact in our communities. Please reach out if you would like additional information on leading a growth business as a force for good.