



Overview of the Foundation for Financial Planning (FFP)

October 2024

Visit [FFPprobono.org](https://ffpprobono.org)



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 29 years, we have helped mobilized over 30,000 CFP® professionals as volunteers and granted over \$9.7M in funding to pro bono programs, reaching over 745,000 people in crisis or need with free financial guidance.

How do we do it?

1. **We develop and support pro bono financial planning programs in partnership with nonprofits around the country**, providing grant funding, technical assistance, and other resources to ensure that FFP-supported programs are effectively reaching those most in need of free financial advice.
2. **We recruit and train financial advisors to do pro bono service – and connect them directly to pro bono opportunities** through our volunteer platform, ProBonoPlannerMatch.Org.
3. **We lead the movement to foster pro bono service within the profession** via original research, industry partnerships, and public awareness activities.

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FOUNDATION FOR
FINANCIAL
PLANNING

Powering Pro Bono Financial Planning

ProBonoPlannerMatch.Org



FOR VOLUNTEERS

FOR NONPROFITS

TRAINING AND RESOURCES

BROWSE OPPORTUNITIES

LOGIN

SIGN UP

- Over 2,600 CFP® professional volunteers and 173 nonprofits have registered to date.
- Currently, about 40 different types of opportunities are posted.

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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Training & Resources

FFP's priority is to lower barriers to pro bono financial planning, including by offering a range of resources for advisors seeking to volunteer:

- Pro Bono Financial Planning Volunteer Training, a free, 50-minute online module that helps financial planners understand the basics of how to provide pro bono service to lower income clients (one-hour of CE credit).
- Worksheets, skill-building webinars, user-friendly disclosures (such as a sample Letter of Engagement) and more.
- Free E & O Liability Insurance, complimentary for CFP® professionals who connect with a pro bono opportunity through ProBonoPlannerMatch.Org, or volunteer with any of FFP's grantees.

To learn more, please visit: FFPprobono.org/volunteers

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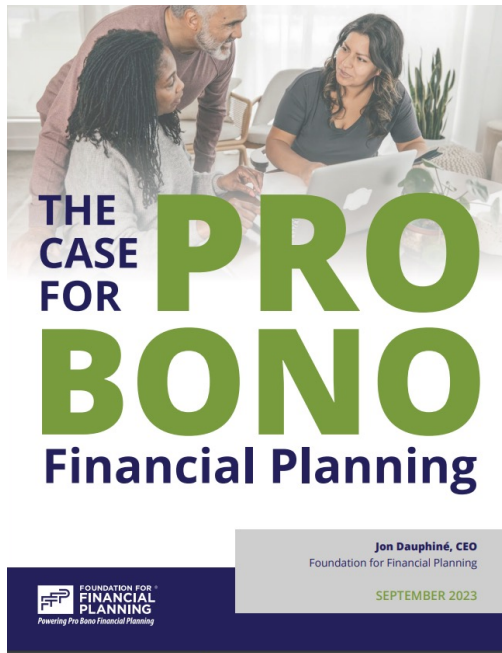


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Powering Pro Bono Financial Planning

The Case for Pro Bono Financial Planning

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



Some Key Findings:

- Advisors' number one motivator for doing pro bono is the satisfaction they get from people in need.
- Advisors would be more likely to want to work at a firm that has an encouraging policy on pro bono.
- Advisors agree that pro bono service develops key hard and soft skills.



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What Advisors & Firms Can Do



SIGN UP TO VOLUNTEER at ProBonoPlannerMatch.Org
(must be a CFP® professional to register)



ENCOURAGE YOUR FIRM or employer to sign on as an FFP RIA Impact Partner or Corporate 100 Club member; find out more at FFPprobono.org/our-supporters



SUPPORT THE CAUSE with a charitable, fully tax-deductible gift at FFPprobono.org/Donate



STAY INFORMED by signing up for our monthly e-newsletter at FFPprobono.org/Get-updates



TELL YOUR NONPROFIT PARTNERS about how FFP can help them to develop pro bono programs; find out more at FFPprobono.org/Nonprofits

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