



# 5-Year Strategic Plan Summary

## Mission & Vision

The Foundation for Financial Planning’s mission is to help people in need improve their financial lives by expanding access to pro bono financial planning. We envision a future in which all people can benefit from quality financial advice.

## Strategic Framework



### Key Objectives

### Sample Metrics\*

<p><b>1 Mobilize the profession</b> to increase engagement in pro bono service</p>	<p><b>YY%</b> of all CFP professionals are providing pro bono service in a given year (tracked via CFP Board portal; baseline data acquired by end 2019)</p>
<p><b>2 Increase FFP’s financial capacity</b> in order to grow our grant funding &amp; program services</p>	<p>A minimum of <b>\$YY</b> in new gifts/pledges raised annually; FFP Endowment has reached <b>\$XXM</b></p>
<p><b>3 Expand access</b> to and impact of pro bono financial planning programs for at-risk individuals and families</p>	<p>FFP able to grant in range of <b>\$XX</b> each year (based on size of endowment); <b>80%</b> of grantees meet or exceed their performance goals</p>
<p><b>4 Grow public awareness</b> of FFP and pro bono financial planning</p>	<p><b>XX%</b> of all CFP professionals have heard of FFP</p>

*\*Metrics are samples under discussion by Board of Trustees.*