



FOUNDATION FOR
**FINANCIAL
PLANNING**

Powering Pro Bono Financial Planning



Pro Bono Financial Planning Changes Lives.

The Foundation for Financial Planning is committed to helping people in need access quality financial planning and advice.

HOW DO WE DO IT?

- › **We provide grants to local and national nonprofits** to support programs linking financial planners to families who could not otherwise afford quality financial guidance.
- › **We help recruit and connect volunteer financial planners to people in need** through targeted outreach and working with our corporate and association partners.
- › **We develop innovative program models** with key partners to reach populations where we can have a particularly strong impact, like military families and people affected by cancer.
- › **We offer free financial planning resources to people in need and the volunteers who help them**, including training and best practices for volunteer planners.
- › **We raise awareness of the profession's commitment to pro bono** through community events, national conferences, digital and traditional media, and more.

OUR HISTORICAL IMPACT



Have awarded over \$7 million
in grant funding



213,314 hours have been contributed
by financial planners, valued at \$42 million



Have helped activate more than 20,000
volunteer financial planners



Have reached over 440,000 people
in crisis or need



(202) 864-5183 | FoundationForFinancialPlanning.org
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Imagine if everyone had access to quality financial advice.



“Without this program, I don’t know where my girls and I would be. My financial planner helped me fix my credit, save over \$2,000 and buy my first home. My family’s life is forever changed.”

– Angela R., a clinical nurse and domestic violence survivor



“It was so helpful to talk to someone outside of our immediate community – someone who we knew wouldn’t judge or pity us but could simply offer an expert, objective perspective on our finances.”

– John H., a teacher whose daughter was diagnosed with cancer at age 12



“When you go through the process of being a caregiver for two years, you lose focus. Finances aren’t the priority. We ended up with a mountain of debt, and it was only thanks to our financial planner that we climbed that mountain and got to the top.”

– Melissa D., wife of a veteran severely wounded in Iraq

YES! I would like to make a tax-deductible gift to support pro bono financial planning.

I would like to contribute/pledge:

\$50,000* \$25,000* \$10,000* \$5,000 \$1,000 \$500 \$100 Other \$ _____

**Donors pledging \$10,000 or more can become part of the Pro Bono for Cancer Campaign Leadership Circle. Visit ProBono4Cancer.org for details.*

I will fulfill this gift:

As a one-time contribution or Annually over _____ years** (5 years max). My first payment of \$ _____ is enclosed.

***Only gifts \$1,000 and up can be pledged as multi-year gifts. You will be invoiced each year around the time of your initial payment.*

Name _____ Company Name _____

Address _____ City _____ State _____ Zip _____

Phone _____ Email _____

Enclosed is my check payable to the Foundation for Financial Planning or Please charge my: Visa MasterCard Discover AMEX

Credit Card Number _____ Expiration Date _____ CVV _____

Signature _____ Date _____

For multi-year pledges, charge this card on this date each year: _____

For gifts via donor advised fund: I pledge to nominate the Foundation for Financial Planning to receive \$ _____ through my donor advised fund.

Please return this form to Katie Hammer at KHammer@FoundationForFinancialPlanning.org or mail to **Foundation for Financial Planning, 1425 K Street NW, Suite 750, Washington, DC 20005.** To donate online or make a gift of stock, please visit: FoundationForFinancialPlanning.org/donate

All contributions to the Foundation for Financial Planning are tax-deductible as provided by law.