



**FOUNDATION FOR
FINANCIAL
PLANNING**

Powering Pro Bono Financial Planning



2018 Impact Report

Each year, the Foundation for Financial Planning helps develop and support programs connecting vulnerable families and individuals to free, quality financial advice. In 2018, we stood up a new signature initiative, Pro Bono for Cancer, connecting hundreds of families affected by cancer with volunteer financial planners across the country. We were also proud to support efforts that benefited homeless women and their families, low-income homebuyers, military, domestic violence survivors and more. Major milestones in 2018 included:

- **Launched all-new Pro Bono Financial Planning Volunteer Training**, a CE-eligible online course, which was completed by 160 planners in 2018.
- **Launched the Pro Bono for Cancer initiative**, including a customized volunteer training module and digital program infrastructure, resulting in a scalable national, virtual, and multi-touch pro bono program, attracting volunteers from 23 states serving hundreds of families.
- **Secured top rankings** from the nation's leading charity rating organizations, Charity Navigator and GuideStar.

OUR HISTORICAL IMPACT



HAVE AWARDED OVER \$6.9 MILLION
IN GRANT FUNDING



213,314 HOURS HAVE BEEN CONTRIBUTED
BY FINANCIAL PLANNERS, VALUED AT \$42.6 MILLION



HAVE HELPED ACTIVATE 20,576
VOLUNTEER FINANCIAL PLANNERS



HAVE REACHED 441,116 PEOPLE
IN CRISIS OR NEED

2018 IMPACT



AWARDED \$359,350
IN GRANT FUNDING



23,527 HOURS CONTRIBUTED
BY FINANCIAL PLANNERS, VALUED AT \$4.7 MILLION



HELPED ACTIVATE 1,978
VOLUNTEER FINANCIAL PLANNERS



REACHED 22,957 PEOPLE IN NEED,
INCLUDING 13,320 THROUGH GROUP WORKSHOPS
AND OVER 9,637 THROUGH ONE-ON-ONE SESSIONS



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2018 Grantees

In 2018, we proudly supported pro bono financial planning programs and events across the country, including grants to 16 nonprofits and 14 Financial Planning Association® (FPA®) chapters. Our 2018 nonprofit grant recipients include:

Organization	Location	Key Population Served
ACHIEVA	Pittsburgh, PA	Families with disabled children
Austin Habitat for Humanity	Austin, TX	Low-income individuals and families
Britepaths	Fairfax, VA	Low-income individuals and families
Capital Area Asset Building Corporation	Washington, DC	Low-income individuals and families
Coalition for a Better Acre, CBA	Lowell, MA	Low-income individuals and families
Consumer Education and Training Services (CENTS)	Seattle, WA	Cancer patients and their families
DebtWave Credit Counseling, Inc. d.b.a. San Diego Financial Literacy Center	San Diego, CA	Low-income individuals and families
Family Reach	Boston, MA	Cancer patients and their families
Financial Independence Training Inc.	La Mesa, CA	Military/veterans
Financial Planning Association	Denver, CO	Low-income individuals and families
Goodwill Industries of Lane and South Coast Counties	Eugene, OR	Low-income individuals and families
Goodwill of Greater Washington	Washington, DC	Low-income individuals and families
I Care Atlanta	Doraville, GA	Low-income individuals and families
LTSC Community Development Corporation	Los Angeles, CA	Low-income individuals and families
NCEF-NAPFA Consumer Education Foundation	Chicago, IL	Wounded veterans
Working in Support of Education	New York, NY	Domestic violence survivors