



FOUNDATION FOR
**FINANCIAL
PLANNING**

Powering Pro Bono Financial Planning

2019 Impact Report

2019 was a year of action, collaboration, and impact. The Foundation for Financial Planning (FFP) continued to make great strides in helping people in need improve their financial lives by expanding access to pro bono planning and advice. Highlights included:

- **Growing our Pro Bono for Cancer initiative to help more than 600 families** facing serious cancer through the efforts of over 200 volunteer financial planners across 28 states. Of patients surveyed, 91% reported that the planner always listened carefully and explained things in a way they could understand, and 100% said they would recommend the program to a loved one with cancer.
- **Convening the first-ever Nonprofit CEO Summit on Pro Bono Financial Planning** to foster shared purpose and collaboration among the CFP Board, Financial Planning Association, and National Association of Personal Financial Advisors. A joint statement outlining our mutual commitment was published in *InvestmentNews*.
- **Bestowing our first-ever Registered Program Excellence in Pro Bono Award** (with CFP Board) to the University of Georgia for engaging students in this critical work; and our first-ever *Power of Financial Planning Award* (with the Financial Planning Association) to FPA's Georgia Chapter for its exemplary pro bono efforts.
- **Expanding the knowledge base on pro bono service** by collaborating on CFP Board's 2019 Biannual Certificant Survey, learning that two-thirds of CFPs engage in pro bono work, with an average of 31 hours provided per certificant in the last year.
- **Recruiting more major companies to join our Corporate 100 Club as top supporters of pro bono**, including BlackRock, Dimensional Fund Advisors, Envestnet, E*TRADE Advisor Services, and Orion Advisor Services.

2019 IMPACT



AWARDED \$492,550
IN GRANT FUNDING



23,235 HOURS CONTRIBUTED
BY FINANCIAL PLANNERS, VALUED AT \$4.6 MILLION



HELPED ACTIVATE 1,687
VOLUNTEER FINANCIAL PLANNERS



ASSISTED 26,699 PEOPLE IN NEED,
INCLUDING 17,515 THROUGH GROUP WORKSHOPS
AND OVER 9,184 THROUGH ONE-ON-ONE SESSIONS



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2019 Grantees

In 2019, we proudly supported pro bono financial planning programs and events across the country, including grants to 17 nonprofits and 14 Financial Planning Association® (FPA®) chapters. Our 2019 nonprofit grant recipients include:

Organization	Location	Key Population Served
Austin Habitat for Humanity	Austin, TX	Low-income individuals and families
Britepaths	Fairfax, VA	Low-income individuals and families
CASH Campaign of Maryland	Baltimore, MD	Low-income individuals and families
Carolinas HealthCare Foundation	Charlotte, NC	Cancer patients and their families
Consumer Education and Training Services (CENTS)	Seattle, WA	Cancer patients and their families
Compass Working Capital	Boston, MA	Low-income individuals and families
DebtWave Credit Counseling, Inc. d.b.a. San Diego Financial Literacy Center	San Diego, CA	Low-income individuals and families, Military/Veterans
EnAct, Inc.	Charleston, WV	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
GreenPath Financial Wellness	Farmington Hills, MI	Low-income individuals and families
Kentucky Coalition Against Domestic Violence	Frankfort, KY	Domestic Violence Survivors
NCEF-NAPFA Consumer Education Foundation	Chicago, IL	Wounded Veterans
United Policyholders	San Francisco, CA	Victims of Natural Disaster
Women's Educational Center, Inc.	Cambridge, MA	Low-Income Women
VeteransPlus	Clearwater, FL	Military/Veterans



FFP is proud to be recognized as a **Charity Navigator 4-star Charity** and a **GuideStar Platinum Nonprofit**, the top possible ratings. Each year, we aim to maintain the highest level of transparency and integrity to ensure our supporters can feel good about investing in our cause. We understand that you have a choice in your charitable giving so thank you for your ongoing support.