



Engaging Volunteer Financial Advisors to Help Your Constituents: **5 Steps Nonprofits Can Use to Get Started**

- 1 Assign Program Manager:** Assign a staff member at your nonprofit to be the point of contact between your organization, the client in need, and the CERTIFIED FINANCIAL PLANNER™ professional volunteer.
- 2 Collect Client Information:** Work with your organization's staff (social workers, coaches, navigators, other front-line workers, etc.) to identify clients that are concerned about their finances or asking for financial guidance. Create a system for collecting their contact information (many organizations use an online form such as SurveyMonkey.com). This contact information is what you will provide to the CFP® professional volunteer.
- 3 Recruit Volunteers:** Using [ProBonoPlannerMatch.org](https://www.probonoplannermatch.org), create a profile for your organization and a posting about the volunteer opportunity. You can add several staff members at your nonprofit to manage your profile and opportunities within the dashboard. In the sign up, provide some information about who the volunteers will be serving (demographic, unique challenges) and a general overview of some of the needs that they have. This could include: helping with savings, prioritizing debt, paying off student loans, accessing government benefits, etc. CFP® professionals who have registered to volunteer will reach out to you if interested in your opportunity.
- 4 Provide Training:** Encourage your CFP® professional volunteers to take the Foundation for Financial Planning's online [Pro Bono Financial Planning Volunteer Training](https://www.probonoplannermatch.org). This is a free, 50-minute online module that helps financial planners understand the basics of providing pro bono service to underserved people. This training is approved for one hour of continuing education (CE) credit by the Certified Financial Planner Board of Standards (CFP Board). As you onboard the volunteer, provide background on your nonprofit's work and more information about the individuals the volunteer will be serving (demographic, needs, unique challenges, etc.) along with any resources that you can provide.
- 5 Connect the CFP® Professional Volunteer with the Client:** Provide the pro bono volunteer with the client's contact information. The planner will work with the client to coordinate planning sessions. If bandwidth allows, we encourage you to create a reporting system where pro bono volunteers could provide you with very general information and feedback about the engagement. Because of confidentiality, they should not provide you with specific details about the client.



For more information about how you can connect with volunteer financial advisors, please visit:
[ProBonoPlannerMatch.org](https://www.probonoplannermatch.org).

What is Pro Bono Financial Planning?

Free, no-strings-attached financial advice and planning for at-risk people who otherwise couldn't afford it. Programs should offer one-on-one interactions or small, interactive workshop settings where the client can benefit from the planner's personalized, actionable advice.



Why engage CFP® Professionals?

CERTIFIED FINANCIAL PLANNER™ professional volunteers can help low-to moderate- income individuals and families in many ways by assessing their financial situations, challenges, and questions and providing objective, ethical advice and actionable steps for improvement.

What resources are available?

We have [General Resources for Nonprofits and Financial Planners](#), which include:

- **Sample Volunteer Agreement Disclaimer:**
This disclaimer ensures that the CFP® professional volunteer and the nonprofit organization agree to a set of terms as they engage with one another.
- **Sample Client / Planner Letter of Engagement:**
A letter of engagement, which should be signed by the financial planner and the client, is an important tool in a pro bono relationship.



We have also developed a [Coronavirus and Pro Bono Planning Resource Center](#) to help you navigate the crisis as it relates to personal finance and pro bono financial planning. We'll be using this page to post helpful information, resources, links and opportunities that can help planners and families as the situation develops.



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