2020 was a challenging year, leaving millions of Americans devastated – physically, mentally, and financially. The financial fallout of COVID-19 has been severe, with almost 70% of U.S. households reporting economic hardship by year-end, and more than three-quarters of that group concerned about being able to pay their bills.

Foundation for Financial Planning (FFP) has worked hard to support and expand pro bono financial planning programs that reach those most impacted by the pandemic, including low-income essential workers, families of color, people with serious cancer, at-risk seniors and more.

2020 also marked FFP’s 25th Anniversary, and we were proud to surpass some key milestones, including awarding a total of $8 million in grants to worthy pro bono programs and bringing financial planning and advice to 500,000 people in need.

**BY THE NUMBERS**

**Over the last year, FFP has:**

- **Awarded over $800,000 to local and national pro bono programs** for 2020 and 2021, including $61,000 in emergency grants to help our partners pivot to virtual service delivery models.

- **Reached over 43,000 people with pro bono financial advice**, including 23,000 financially vulnerable seniors through our Retirement Resilience Program.

- **Activated 1,737 volunteer financial planners**, including 563 through our newly launched ProBonoPlannerMatch.org platform.

- **Helped bring intensive pro bono financial planning to 435 families facing a serious cancer diagnosis**, adding to the 1,060 total families helped since the start of our Pro Bono for Cancer effort.

- **Attracted over 4,800 visitors to our Coronavirus & Pro Bono Planning Resource Center and educational webinars** on how to help at-risk families amid the pandemic.
“It doesn’t seem like there’s a lot of practical support out there to help middle-class people so they don’t lose everything they’ve worked for. This program has been one of the most helpful things I’ve had access to as a cancer patient. I feel a lot more secure about making it through this year.”
- Serenity, a cancer patient and client of FFP grantees Angel Foundation who lost work amid the pandemic

HIGHLIGHTS FROM A YEAR OF PROGRESS

To help financially struggling people, FFP:

- Embraced technological innovation, offering six web-based events as part of our Retirement Resilience Program in partnership with AARP and Stratos Wealth Partners. CERTIFIED FINANCIAL PLANNER™ professionals answered personalized questions and conducted one-on-one phone consultations, providing free financial guidance to more than 23,000 financially vulnerable seniors.

- Piloted a new program for financially struggling nurses in partnership with American Nurses Foundation and Edelman Financial Engines.

To encourage volunteerism, FFP:

- Launched our new volunteer matching platform, ProBonoPlannerMatch.org, registering 563 financial planner volunteers and 29 nonprofit hosts to post available pro bono opportunities.

- Began offering complimentary E&O liability insurance to all qualified CFP® professionals doing pro bono work with an FFP grantee or through ProBonoPlannerMatch.org.

- Developed new, more user-friendly disclosures for use in pro bono engagements, compliant with the Certified Financial Planner Board of Standards (CFP Board).

“It was so rewarding to make a real difference in someone’s life, even during a short phone call. Thanks to FFP for organizing this program – it’s a powerful help to struggling seniors in our community, and I was grateful to be a part of it.”
- Hannah Depew, CFP®
“It’s been a humongous relief. I’m a single father of three, so to be able to have my finances in order and to not have to worry about money at all, that’s the biggest thing.” – Michael, a wounded Army veteran and client of FFP grantee NAPFA Foundation

HIGHLIGHTS FROM A YEAR OF PROGRESS

To advance pro bono service in the profession, FFP:

- Worked with our Corporate Advisory Council to issue a joint statement on the importance of pro bono service within the advisory profession, including a suggestion that the CFP Board formally recommend that each CFP® professional voluntarily perform 25 hours of pro bono service per year. Council leaders also committed to examine their own policies and practices to advance pro bono within their companies.

- Recruited more major companies to join our Corporate 100 Club (C100) as top supporters of pro bono, including Goldman Sachs Personal Financial Management and T. Rowe Price, for a total of fourteen C100 companies.

- Honored FPA-New York Chapter for their exemplary pro bono program, and Utah Valley University Registered Program for student engagement in pro bono, in collaboration with our partners Financial Planning Association® (FPA®) and CFP Board.

“Nurses are under extraordinary mental and financial pressure right now. Through this program with FFP, they can access a financial expert to help relieve some of that daily burden, which is an invaluable offering during this difficult time.” – Marla Weston, former CEO of American Nurses Association

FFP has once again been named a Charity Navigator 4-star Charity and a GuideStar Platinum Nonprofit, the highest ratings available from both organizations. Each year, we work to maintain the highest level of transparency and integrity to ensure our supporters can feel confident about investing in our cause.
In 2020, we proudly supported pro bono financial planning programs and virtual events across the country, including grants to 19 nonprofits; and grants to support FPA’s national pro bono program and its local Chapters. Our 2020 nonprofit grant recipients include:

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<th>Organization</th>
<th>Location</th>
<th>Key Population Served</th>
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<td>DebtWave Credit Counseling, Inc. d.b.a. San Diego Financial Literacy Center</td>
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