



RIA Impact Partners



Foundation for Financial Planning (FFP)'s RIA Impact Partners represent leading independent firms committed to advancing pro bono service and setting an important example for the financial advisory space. With a charitable commitment to our mission, RIA Impact Partners will be offered opportunities to connect with like-minded leaders while enhancing workplace culture and engagement through rewarding volunteer opportunities for their advisors. Join us today to help bring pro bono financial guidance to those in need!

Pledge Requirement:

Minimum commitment of **\$25,000**, paid over up to two years.

Benefits Include:

- **Early access for your employees** who are CFP[®] professionals to sign up for select pro bono opportunities throughout the year, including our Retirement Resilience Program serving at-risk seniors and our Financial Planning for Cancer program serving families affected by cancer.*
- **“Lunch & Learn” presentation** to your firm’s leaders and employees providing an overview of how to get started with pro bono service, including key resources and opportunities available to your advisors.
- **Opportunities for your firm’s leadership** to connect and collaborate with FFP trustees and other RIA Impact Partners through bi-annual strategy meetings around how to broaden and strengthen our mission to make financial planning more accessible to all.
- **Your brand highlighted** alongside other RIA Impact Partners on FFP’s website and in at least one full-page ad featured in leading industry publications like *InvestmentNews*, *Barrons*, and *Journal of Financial Planning*.
- **Optional press release** provided by FFP to publicly announce the partnership.
- **Chance to engage with FFP leadership** to identify other areas of visibility for your firm’s pro bono efforts, including advisor spotlights in our monthly e-newsletter and across our social media channels.
- **Support from FFP staff** to help create content related to the partnership for your firm’s website, advisor and client communications, etc. (as requested).

**Your firm will be invited to promote available volunteer opportunities to your advisors, with support from FFP. Once advisors sign up, FFP and our partners will facilitate the pro bono opportunities with little required from your firm. All qualified volunteers will be covered by FFP’s E&O liability insurance policy at no cost to them or your firm.*



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FOUNDATION FOR[®]
**FINANCIAL
PLANNING**

Powering Pro Bono Financial Planning

Foundation for Financial Planning (FFP) thanks our current RIA Impact Partners for their generosity in this time of great need. Uniting in common purpose, these firms and their advisors are investing time and money to help bring pro bono financial guidance to more vulnerable Americans. Join the movement today.



Accredited Investors
WEALTH MANAGEMENT[®]

CELEBRATING
35
YEARS



BUDROS RUHLIN ROE



CARSON



SIGNATURE ESTATE & INVESTMENT ADVISORS, LLC[®]
Established 1997



**TARBOX
FAMILY
OFFICE**

Member List current as of June 2022



“You can’t truly appreciate the impact advisors can have on the lives of those who need our help until you do the work without expecting anything in return. This is why we’re proud to have joined some of the country’s leading RIAs, in partnership with FFP, as a member of the RIA Impact Partner program. There’s no better way to dedicate our time, expertise and efforts to at-risk families in desperate need of sound financial advice.” - **Teri Shepherd, President, Carson Group**



“We believe so strongly in the necessity of FFP’s mission and are proud to be including it as part of our [leadership training]. It is so important for next-gen advisors to have the chance to weave pro bono opportunities into their practice from the start.” - **Bob Oros, Chairman and CEO, Hightower Advisors**