



FOUNDATION FOR
**FINANCIAL
PLANNING**

Powering Pro Bono Financial Planning



Creating Continuity of Access to Financial Education

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Rachel Roth



Who We Are

More than half of Americans do not have savings to cover a \$1,000 unexpected expense.

We are devoted to helping people in need improve their financial lives by expanding access to pro bono advice and guidance.

Foundation for Financial Planning (FFP):

- **Provides grants** to nonprofits to develop and grow pro bono programs
- **Connects volunteer financial planners** to pro bono opportunities
- **Develops signature programs** with national reach
- **Offers free pro bono training and resources** for volunteers
- **Raises awareness** of the importance and impact of pro bono service





Who We Serve





How Pro Bono Financial Planners Can Help

Financial planner volunteers provide objective, ethical advice and actionable steps for improvement, helping financially vulnerable individuals to:

- Set and prioritize goals
- Create or assess a household budget
- Manage or prioritize debts
- Save for an emergency fund, other major needs, and begin to invest
- Understand complex financial concepts and products, including insurance, mortgages and taxes
- Navigate employee and government benefits like Social Security and Medicare
- Avoid scams and predators
- And much more...



Pro Bono Planner Match

PRO BONO PLANNER MATCH (ProBonoPlannerMatch.Org):

First-of-its-kind platform that will connect thousands of financial advisors to pro bono financial planning opportunities – right from their desks.



[FOR VOLUNTEERS](#)

[FOR NONPROFITS](#)

[TRAINING AND RESOURCES](#)

[BROWSE OPPORTUNITIES](#)

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Together We Can Change Lives

Pro Bono Planner Match helps bring free, quality financial advice and planning to people in need by matching CERTIFIED FINANCIAL PLANNER™ professionals with volunteer opportunities nationwide.





PBPM: Sample Opportunities



Help Seniors in Need in March

Foundation for Financial Planning | Virtual | Ongoing

We are working with AARP to bring financial education, personalized guidance, and one-on-one consultations to financially vulnerable seniors through a series of webinars and virtual engagements with volunteer financial planners.

For the next event in March, we are seeking **Certified Financial Planner™** professionals to...



Volunteer Financial Coach

CAHS Financial Coaches | Virtual | Ongoing

CAHS Financial Coaches are assigned mentees who they meet with at least once a month over the course of three months to examine the areas of budgeting, savings, credit and debt management. Common goals our low to moderate income clients come to us with include first time homebuying, financing higher education, preparing for retirement, and more. We serve clients of all different demographics all across the state of Connecticut. Our Financial Coaching sessions are done...



Seeking Bilingual Spanish-speaking CFP's & AFC's for volunteer opportunities in District/Maryland/Virginia

Britepaths, Inc. | Virtual | 3/01/22

Britepaths, a Fairfax County non-profit, provides financial literacy educational opportunities to Low to Moderate income adults in the Metro DC area. We will hold a volunteer introduction and training Zoom event on **Tuesday, March 1, from 6:30 - 7:30 pm** to introduce you to our volunteer jobs and organization. We are currently seeking bilingual volunteers, especially Spanish speaking. Please sign up and get to know us! For pre-reading, you can see volunteer job descriptions and complete an...



PBPM: Sample Opportunities



Financial Decision-Making Clinic for Wildfire Disaster Survivors (California - March 3, 2022): CA-Based Volunteers Preferred

United Policyholders | Virtual | 3/03/22

Your Money and Your Post-Wildfire Future is a free Roadmap to Recovery clinic offered by United Policyholders, a nonprofit consumer organization helping disaster survivors navigate the insurance claim process for over 30 years. In partnership with Certified Financial Planners, the clinic will provide pro bono financial planning services to recent California wildfire survivors whose homes were insured and destroyed or damaged.



Brighten someone's financial future! Volunteer with Prepare + Prosper

Prepare + Prosper | , MN | Ongoing

Are you looking for a meaningful volunteering opportunity this winter? **Prepare + Prosper** (P+P) is currently recruiting volunteers for the 2022 tax season! P+P provides free tax preparation and financial services to individuals and families with low- to moderate-incomes. With several in person and remote volunteer roles to choose from, there is something for everyone.

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Family Reach: Financial Planning for Cancer

Family Reach | Virtual | Ongoing

We are currently seeking volunteers for a program we have developed in partnership with the Foundation for Financial Planning (FFP) and Financial Planning Association (FPA) to provide cancer patients and their caregivers with financial planning and education to help mitigate the financial risks



Financial Continuum of Care

Financial Wellness Continuum

