

2019 ANNUAL REPORT



CFP BOARD
**CENTER
FOR
FINANCIAL
PLANNING**





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Kate Healy

Managing Director, Generation Next, TD Ameritrade Institutional

“The Center is an important agent of change that enables all corners of the profession to work together in a collective effort. As Lead Founding Sponsor of the Center, we are proud to support the important work of building a more diverse and sustainable financial planning profession.”

LEADERSHIP MESSAGE

As we look back on the previous year, we must recognize the unprecedented circumstances of the present. The COVID-19 pandemic has challenged us all, as we have sought to protect our families and our communities. It has been a time of fear and anxiety, but also of compassion and heartwarming demonstrations of unity during a time of great collective need.

It has also highlighted the tremendous demand for and value of personal financial advice. Whenever we experience a period of market volatility, as we have in the last few months, we see an increase in the number of Americans turning to CFP® professionals for guidance on how to weather the storm. They rely on their financial planners to help them understand what is happening and make sound financial decisions.

Ensuring that our profession is able to meet this need for competent, ethical financial planning advice—now and well into the future—is the purpose of the CFP Board Center for Financial Planning. The Center has continued its crucial work to create a more diverse and sustainable financial planning profession throughout this difficult time, while taking every precaution to safeguard the health and well-being of our staff, volunteers and stakeholders. Every day we make meaningful progress toward building a larger pipeline of young, diverse and workforce-ready talent who can provide the advice that Americans need. Working with firms, practitioners, academics and other stakeholders, we are solving the challenges our profession faces systematically—and together.

We are proud to share with you the progress we have made in the last year, as well as a look ahead to the Center's upcoming programs and initiatives. The work and achievements detailed in this report were made possible by the many corporate sponsors, individual donors and volunteers whose generous contributions support our programs.

We are grateful to 4,546 firms and individuals who have donated more than \$13.2 million to the Center since its launch in 2015. We extend special thanks to our Lead Founding Sponsor TD Ameritrade Institutional and our Founding Sponsors Northwestern Mutual, Envestnet and the Charles Schwab Foundation, in partnership with Schwab Advisor Services, as well as The Deena Jo Heide-Diesslin Foundation and its chairman, David Diesslin, CFP®, for their significant support of and continued commitment to our work.

We also thank the dedicated Center volunteers who have shared their knowledge, passion and commitment to advancing our profession. We rely on more than 3,100 individuals to help us implement Center programming—from the “I am a CFP® Pro” campaign to our CFP Board Mentor Program. These volunteers include the members of the Center's advisory bodies—our Advisory Council, Development Committee, Women's Initiative Council, Diversity Advisory Group and Workforce Development Advisory Group—who play a leading role in developing and executing the Center's agenda. We thank them for their vision and leadership.

Finally, we must recognize Marilyn Mohrman-Gillis, the Center's former executive director who retired last fall. Marilyn was a true champion of the Center and a staunch advocate for its critical work from day one. The Center flourished under her leadership, expanding its programming and partnerships and broadening its reach to achieve the outcomes we celebrate in this report. We are thankful for Marilyn's extraordinary service to the profession and wish her a wonderful retirement.

As we continue to navigate this trying and stressful time together, the Center team remains committed to attracting and retaining the next generation of financial planners, promoting greater diversity in our workforce, and supporting and sharing cutting-edge research that advances the knowledge of our professionals. We look forward to your continued partnership in this collective endeavor and are confident that, together, we can ensure our profession's ability to serve the public for years to come.

With gratitude,



Kevin R. Keller, CAE
Chief Executive Officer
CFP Board

A handwritten signature in black ink that reads "Kevin R. Keller". The signature is written in a cursive, flowing style.



D.A. Abrams, CAE
Managing Director
CFP Board Center for Financial Planning

A handwritten signature in black ink that reads "D. A. Abrams". The signature is written in a cursive, flowing style.

ABOUT THE CFP BOARD CENTER FOR FINANCIAL PLANNING



Paul Shane, Sr.

Director, Talent Management & Leadership Development, Northwestern Mutual

“Northwestern Mutual is proud to support the Center and its work to elevate our profession. Our partnership is continuously enriched through the Center’s cutting-edge research and programming that addresses the current and future needs of the profession.”



Kimberly Beck

Senior Vice President of Marketing, Envestnet

“The Center provides a meeting place for firms to collectively address the evolving needs of the financial planning profession. Through Envestnet’s sponsorship of the Center, we are not only expanding the talent pipeline but also equipping new talent with knowledge to effectively serve clients.”

The Center for Financial Planning is a distinct initiative of the Certified Financial Planner Board of Standards, Inc. (CFP Board).

OUR VISION

Every American has access to competent and ethical financial planning advice.

OUR MISSION

To create a more diverse and sustainable financial planning profession.

OUR PHILOSOPHY

Create programs and services that are responsive to the needs of our stakeholders.

OUR PRIORITIES

Talent Pipeline

Cultivating a quality workforce to ensure the profession can recruit and retain the talent it needs to grow.

Diversity and Inclusion

Fostering a more diverse financial planner workforce that reflects the changing demographics in the United States.

Knowledge for Practice

Elevating financial planning as a recognized academic discipline in colleges and universities, while providing practitioners with cutting-edge knowledge to thrive and provide outstanding financial planning advice to clients.

OUR IMPACT BY THE NUMBERS

CREATING A MORE DIVERSE AND SUSTAINABLE PROFESSION

- Welcomed nearly **1,300** new women CFP® professionals in 2019, a record increase in a single year, reaching a total of over **20,000** women CFP® professionals for the first time.
- Increased the number of African American and Latinx CFP® professionals to **3,259** in 2019 – three times the rate of growth of all CFP® professionals in 2019.
- Increased the number of CFP® professionals under 30 years of age to **4,686** in 2019, a 75% increase since 2016.



BUILDING THE CENTER'S CAPACITY FOR LONG-TERM IMPACT

- Raised more than **\$13.2 million** in cumulative gifts and pledges from **4,546** corporate sponsors and individual donors to support the Center's work.
- Engaged over **3,100** volunteers in support of the Center and its initiatives.
- Developed **17** partnerships with organizations focused on workforce development and diversity.
- Completed **4** original research projects.

BUILDING A TALENT PIPELINE

- Awarded **73** scholarships totaling nearly **\$350,000** to aspiring CFP® professionals, with **8** scholars becoming CFP® professionals and **7** others in the final stages of certification.
- Added over **5,500** job postings and registered over **25,000** job seekers and **3,500** employers on the CFP Board Career Center since its launch, with **66** new job postings added every month.
- Generated over **50,000** views and downloads of the *Financial Planning Career Paths* guide for employers.
- Completed a successful second pilot of a career re-entry program in financial planning with **9** firms.



FOSTERING DIVERSITY AND INCLUSION

- Hosted the second annual **Diversity Summit** that convened **380 leaders** from firms, academia and nonprofits, as well as current and aspiring CFP® professionals, for a program focused on driving accountability.
- Published ***Why Diversity Matters: How Workforce Diversity and Inclusion Accelerate Business Success in Financial Planning***, a literature review outlining the business benefits of a diverse workforce, generating over **36,000 views and downloads**.
- Achieved over **3,200 engagements** between mentees and CFP® professional mentors.
- Expanded the “I am a CFP® Pro” campaign and **garnered more than 3,000 stories** on social media using #CFPPro.

ADVANCING KNOWLEDGE FOR PRACTICE

- Published **6 installments of *Financial Planning Review***, the profession’s peer-reviewed academic research journal with an **acceptance rate under 10%**, and generated **37,000 downloads**.
- Convened over **600 leading academicians, researchers and practitioners** at four annual Academic Research Colloquia for Financial Planning and Related Disciplines.
- Offered **5 Financial Planning Teaching Programs** with Columbia University that have prepared **100 prospective teachers**.
- Offered **2 Client Psychology programs** with The Wharton School to help financial planners develop a more client-centered practice, drawing close to 50 participants.
- Added **2 volumes to book series** to expand profession’s body of knowledge: *Client Psychology* (2018) and *Communications Essentials for Financial Planners* (2017).



Leslie Tabor

Managing Director, Business Consulting & Education, Schwab Advisor Services

“The Center’s initiatives are critical in attracting the next generation of talent, diversifying our workforce and equipping financial planners with research-based approaches to competently serve clients. We are proud to work with the Center to advance the financial planning profession.”

TALENT PIPELINE

CULTIVATING A QUALITY WORKFORCE TO ENSURE THE PROFESSION CAN RECRUIT AND RETAIN THE TALENT IT NEEDS TO GROW

Due to an aging and shrinking workforce, the number of financial advisors is declining, just as the demand for ethical and competent financial planning advice grows. The Center is working to attract and develop the next generation of financial planners with the knowledge, skills and agility to meet evolving client needs.



FEATURED ACHIEVEMENT:**SCHOLARSHIP PROGRAMS SUPPORT DOZENS OF CANDIDATES FOR CFP® CERTIFICATION**

Scholarship programs that enable qualified individuals to start or complete the education requirements for attaining CFP® certification continue to play a critical role in the Center's efforts to build the profession's talent pipeline and foster workforce diversity. The Center currently administers five scholarships and marked a major milestone for these programs in 2019: By the end of the year, the Center had awarded 53 scholarships totaling nearly \$250,000. To date, the Center has awarded 73 scholarships, totaling nearly \$350,000.

Thirty-seven awards have been distributed via the Milton Stern Scholars Fund and The Deena Jo Heide-Diesslin Foundation Challenge Match Scholarship—the two programs established during the Center's first year in operation. The Milton Stern Scholars Fund offers scholarships to students seeking to complete a CFP Board Registered Program that qualifies them to take the CFP® exam. The scholarship honors the late Milton Stern's memory, professionalism and contributions to the financial planning profession under the CFP Board Center for Financial Planning. To date, 12 scholars have received more than \$55,000 in funding through the program.

The Deena Jo Heide-Diesslin Foundation Challenge Match Scholarship supports students who belong to populations that are underrepresented in the financial planning profession—based on gender, race, ethnicity, sexual orientation and disability—and/or who have demonstrated financial need. The scholarship is offered through a partnership with The Deena Jo Heide-Diesslin Foundation, which was established by Deena's husband, David H. Diesslin, CFP®, to honor her memory by supporting nonprofits that empower women and minority populations through education. Twenty-five scholarships totaling more than \$123,000 have been awarded.

The other 16 awards were granted through scholarship programs launched in 2018. The Richard B. Wagner Memorial Scholarship Fund assists prospective CFP® professionals seeking to complete a CFP Board Registered Program and new CFP® professionals who want to continue their professional advancement, with a focus on underrepresented populations. This fund is a joint effort between the Center and the Financial Planning Association® (FPA) and honors the memory of Dick Wagner, CFP®, a well-known thought leader in the financial planning community with a passion for building the profession and helping younger financial planners succeed. The Center has awarded more than \$23,000 to five scholars through the fund to date.



Lovetta Tobey
Financial Counselor

"I am both honored and grateful to have been chosen as a recipient of the Richard B. Wagner Memorial Scholarship. Being awarded this scholarship will help me on my path to becoming a CFP® professional, so that I can continue to help individuals and families become financially stable and build generational wealth."



John Head
Financial Advisor

“Receiving the Investnet Scholarship has helped propel my career trajectory. I am both humbled and grateful for the opportunity to add value to the clients I serve while further advancing my career within the financial services industry with the help of Investnet.”

The Investnet Scholarship supports qualified individuals seeking to complete the education and exam related requirements for CFP® certification through a CFP Board Registered Certificate Program. The scholarship is offered as part of the Investnet Institute on Campus program, which is designed to provide the asset and wealth management industry with a talented, diverse pool of workforce-ready interns and entry-level employees. In 2019, 11 scholarships totaling over \$45,000 have been awarded. Thanks to the groundwork laid in 2019, 20 additional scholarships totaling \$100,000 were awarded in 2020. This brings the Investnet Scholarship total to 31 scholarships totaling more than \$145,000.

To date, eight scholarship recipients have gone on to become CFP® professionals; another seven are in the final stages of certification. These initial results demonstrate the direct positive impact of the Center’s scholarship programs on the profession’s talent pipeline and their ability to attract more women and people of color to the profession.

Additionally, the Center has partnered with The American College to provide scholarships that help aspiring CFP® professionals cover the cost of the CFP® exam. These scholarships are available to recipients of The American College’s African American Scholarship Program who have also graduated from the College’s Registered Program.

Expanding upon the success of these programs, in 2019 the Center partnered with California Lutheran University to launch a new joint scholarship to further support students from underrepresented populations. Announced at the 2019 Diversity Summit, the scholarship is open to qualified individuals seeking to complete California Lutheran University’s online MBA or MS degree in Financial Planning, both of which qualify candidates to sit for the CFP® certification exam.

More information on the scholarship programs is available at [CFP.net/Scholarships](https://www.cfp.net/Scholarships).



David H. Diesslin, CFP®
Chairman of The Deena Jo Heide-Diesslin Foundation

“My late wife, Deena, was passionate about empowering individuals and communities facing barriers in life. This scholarship is facilitating pathways into the financial planning profession to help overcome those barriers, which will benefit not only the individual recipients, but their communities, in securing a better future. I’m proud to have this scholarship at the Center, and I ask other philanthropists and firms to join me by investing in the future of our profession.”



Elissa Buie, CFP® and Dr. Dave Yeske, CFP®
Founders, Yeske Buie

“Yeske Buie is pleased to partner with the Center for Financial Planning and Financial Planning Association by contributing to the Dick Wagner Scholarship. By working together, we can attract a diverse new generation of CFP® professionals by helping to eliminate education cost as a barrier into our profession.”

HIGHLIGHTED ACHIEVEMENT:

CAREER PATH GUIDE FOR EMPLOYERS GAINS WIDESPREAD READERSHIP

Since its release in April 2019, the Center’s *Financial Planning Career Paths: Building More Sustainable and Successful Businesses* has become a go-to resource for financial advisory firms and valued guide for practitioners, generating more than 50,000 views and downloads.

The comprehensive guide shares best practices for firms to structure and effectively communicate career path opportunities to professionals, as well as guidance for attracting new talent and developing their current workforce. The guide serves as a tool for employers to support their financial planner recruitment, onboarding, training, career development and retention efforts. It examines, in detail, the responsibilities and necessary skills and experience for each of the five rungs of the financial planner career ladder: Analyst, Associate Advisor, Service Advisor, Lead Advisor and Partner.

Professionals are also using the guide as a roadmap to navigate their financial planning careers. In addition to direction for skills development efforts, *Financial Planning Career Paths* provides a framework for compensation and organizational advancement so that professionals can manage their expectations and be well rewarded for their work.

The Center’s Workforce Development Advisory Group provided key input on the guide’s development, under the leadership of Mark Tibergien, Chief Executive Officer of Advisor Solutions at BNY Mellon Pershing and a nationally recognized expert in workforce development in the financial planning profession and financial services industry.

CFP BOARD
CENTER FOR FINANCIAL PLANNING

FINANCIAL PLANNING CAREER PATHS
BUILDING MORE SUSTAINABLE AND SUCCESSFUL BUSINESSES

Partner

Lead Advisor

Service Advisor

Associate Advisor

Analyst

SIGNATURE SPONSOR **BNY MELLON | PERSHING**

The guide was developed with the generous support of Signature Sponsor BNY Mellon Pershing as well as the support of the Center’s Lead Founding Sponsor TD Ameritrade Institutional, and Founding Sponsors Northwestern Mutual, Investnet and Charles Schwab Foundation, in partnership with Schwab Advisor Services.

To download a copy of *Financial Planning Career Paths*, visit CFP.net/EmployerGuide.



Mark Tiberghien

Chief Executive Officer, Advisor Solutions, BNY Mellon Pershing

“Partnering with the Center for Financial Planning has been rewarding for BNY Mellon Pershing. Our shared goal of advancing the profession has enabled us to produce a valuable career guide that is helping employers attract and develop the next generation of financial planners.”

HIGHLIGHTED ACHIEVEMENT:

CENTER CONCLUDES SECOND FINANCIAL PLANNER RE-ENTRY INITIATIVE COHORT

Following on the heels of a successful first pilot, the Center launched a second cohort of the Financial Planner Re-Entry Initiative (FPRI) in November 2018 in partnership with career re-entry firm iRelaunch. Nine firms participated in this second tranche of the program, which was designed to connect financial planning firms with a high-caliber, primarily female talent pool of mid- to senior-level professionals who are looking to return to the workforce following a career break. These firms created 16 re-entry internships—10 of which were filled—during the FPRI cohort, which ended in November 2019.

FPRI SECOND COHORT

AYCO, a Goldman Sachs Company

Carson Wealth, sponsored by
TD Ameritrade Institutional

The Colony Group

Fidelity

Moisand, Fitzgerald & Tamayo, LLC

Northwestern Mutual

Sullivan Bruyette Speros & Blayney

TD Ameritrade Institutional

Vanguard

Although the FPRI has concluded, *Financial Planner Re-Entry Initiative: Career Path for Professional Women in Financial Planning*—the Center’s comprehensive white paper detailing program outcomes and lessons learned—will continue to be available online.

By detailing the model and key components of FPRI internships, challenges faced by participating firms, and insights from interns hired through FPRI and firm program managers, the white paper provides guidance and best practices for firms seeking to launch a re-entry program.



Sara Nash

Office Manager, Moisand, Fitzgerald & Tamayo, LLC

“Our firm has benefited immensely from participating in this innovative workforce development program. The experience we gained and the impact we achieved demonstrate the value that re-entry internships have as a vehicle for attracting high-caliber female talent into our firm.”

HIGHLIGHTED ACHIEVEMENT:

CFP BOARD’S ONLINE CAREER CENTER CONNECTS FIRMS WITH QUALIFIED CANDIDATES

Since its founding in 2015 with support from Fidelity Institutional, the CFP Board Career Center has become a go-to resource for employers and job seekers, containing job and internship listings and providing career management guidance. To date, the Career Center has added over 5,500 job postings and registered over 25,000 job seekers and 3,500 employers, with 66 new job postings added every month.

In addition, two Online Career Fairs were hosted within the Career Center in 2019. Typically held in the spring and fall, these virtual fairs connect firms with hundreds of CFP® professionals, financial planning students and other qualified individuals seeking employment through one-on-one text and video chats. More than 600 registered job seekers participated in the 2019 fairs, which featured 21 employer exhibitors.

The 2020 Spring Online Career Fair took place on April 2, with additional fairs planned for the summer and fall.

LOOK AHEAD

Career Path Guide for Aspiring Financial Planners - In 2020, the Center will release a guide to financial planning career paths specifically designed for students and career changers who are considering careers in financial planning. Building upon the *Financial Planning Career Paths* guide for firms, the new *Career Path Guide for Aspiring Financial Planners* will examine common business models in the financial planning profession in detail and provide guidance on the skills and other key criteria needed for launching a successful career in each model, as well as the compensation a professional might expect to receive. The guide will be based on new research of firms within a variety of business models and will be developed in coordination with the Center’s Workforce Development Advisory Group.

DIVERSITY AND INCLUSION

FOSTERING A MORE DIVERSE FINANCIAL PLANNER WORKFORCE THAT REFLECTS THE CHANGING DEMOGRAPHICS IN THE UNITED STATES

The changing demographics of wealth in the United States mean the financial planning profession must grow and diversify the ranks of practitioners who can meet the needs of new and future clients. Center programming seeks to raise awareness of financial planning careers among populations currently underrepresented in the profession, as well as effect systemic change across recruiting, training and retention practices to foster a more diverse workforce.



FEATURED ACHIEVEMENT:**SECOND ANNUAL DIVERSITY SUMMIT EMPHASIZES ACCOUNTABILITY, BUSINESS CASE FOR WORKFORCE DIVERSITY**

Nearly 400 financial services firm executives, financial planning program directors from colleges and universities, nonprofit leaders, diversity and inclusion experts, and CFP® professionals came together in November 2019 for the Center's second annual Diversity Summit. Building on the success of the inaugural 2018 Diversity Summit, the 2019 event focused on *accountability* and highlighted the efforts of firms, academic institutions and partner organizations to create a more diverse financial planning profession through the sharing of actionable case studies and best practices. The agenda included presentations by distinguished speakers, such as Maria Contreras-Sweet, founder of Contreras-Sweet Companies and former administrator of the Small Business Administration, and Kenji Yoshino, the Chief Justice Earl Warren Professor of Constitutional Law at New York University. It also featured personal reflections from CFP® professionals of color and facilitated breakout sessions that allowed attendees to work side-by-side on solutions to the profession's lack of diversity.

"As a collective, we need to diversify our ranks so we can fulfill our promise to provide every American with access to competent and ethical financial planning advice," said



Susan John, CFP®, then Chair of the Board of Directors for CFP Board. "Addressing the issue is the first step, but stakeholders—at every level of the profession—need to be held accountable to change their behavior that will result in a truly diverse and inclusive financial planning profession."

The Center also released a new research report during the Diversity Summit. *Why Diversity Matters: How Workforce Diversity and Inclusion Accelerate Business Success*

**Andy Sieg**

President, Merrill Lynch Wealth Management

"We applaud the Center's efforts to attract and support diverse talent in financial planning across our industry. We stand behind this commitment and believe our workforces must reflect the diverse markets in the communities we serve. Our sponsorship of the Diversity Summit aligns with our culture at Merrill, where diversity and an open and inclusive workplace are also fundamental to our growth strategy and momentum."



Cheryl Nash
Chief Executive Officer, Tegra118

"The Center's Diversity Summit serves as a space to have important conversations and generate impactful solutions that will help our industry support and sustain diverse talent. By sponsoring the Diversity Summit, Tegra118 is taking concrete steps toward real progress in diversifying our profession."



Mariapaz Sandoval
Student, University of Central Florida

“The 2019 Diversity Summit helped professionals to understand that we are currently living in an era when firms face complex challenges and geopolitical shifts, and diversity is and should be seen as an enabler—a way to succeed in an evolving marketplace.”

in Financial Services offers a detailed literature review that outlines why a diverse workforce is critical for both the financial planning profession and financial services firms. Through data compiled from a variety of research studies, the report shows that diversity leads to stronger sales revenue, customer growth, greater market share and higher profit levels. The report also identifies four data-supported explanations for how diversity coupled with inclusion leads to stronger overall financial performance:

- Diverse organizations better serve diverse customers.
- Diverse organizations can recruit better talent as they are more attractive to potential employees.
- Diverse organizations are better at retaining talent given that employees in diverse companies are more satisfied and employee turnover is lower.

- Diverse organizations are more creative and innovative because of the diverse environment.

The report not only provides a compelling compilation of evidence that diversity matters to business success, but it also gives diversity and inclusion advocates a tool for working with business leaders and others to act on the conclusions and recommendations of the studies reviewed. Since its release, the report has generated over 36,000 views and downloads. The full report is available at CFP.net/WhyDiversityMatters.

The Center is grateful to Merrill Lynch and JP Morgan Chase for serving as Signature Sponsors of the 2019 Diversity Summit, and Fiserv and Prudential as Major Sponsors. The Summit was also made possible with support from the Center’s Lead Founding Sponsor TD Ameritrade Institutional and Founding Sponsors Northwestern Mutual and the Charles Schwab Foundation, in partnership with Schwab Advisor Services.



Autumn K. Campbell, CFP®
Financial Planner, The Planning Center

“The Center for Financial Planning’s Diversity Summits are addressing key concerns of our time by giving resources and providing space for financial professionals to proactively engage with their own diverse identities and cultures and to simultaneously welcome and empower those of others as well.”

HIGHLIGHTED ACHIEVEMENT:**“I AM A CFP® PRO” PROMOTES FINANCIAL PLANNING CAREERS TO YOUNG PEOPLE**

Diverse CFP® professionals of all backgrounds and business types are working to inspire the next generation of financial planners through the Center’s “I am a CFP® Pro” campaign. In thousands of social media posts, presentations at colleges and universities, professional events and mentor-mentee interactions, these CFP® professionals are sharing their personal stories about why they joined the profession, what their day-to-day work looks like and what it means to them to help clients bring all the pieces of their financial lives together. To date, the campaign has generated over 3,000 posts and stories shared through Instagram and Twitter using hashtag #CFPro.

The Center expanded the campaign early in February 2019 by adding Matt Aaron, CFP®, to the roster of campaign spokespeople. Aaron is the founder of Aaron Financial, a financial planning practice with Northwestern Mutual in Washington, D.C. “I love the opportunity to connect with people to learn about their goals personally, professionally and financially,” says Aaron. “There is a cause and effect relationship to every decision our clients make, so providing them with the confidence that they are doing things right—and the peace of mind that they are going to be okay—is an amazing feeling.”

Aaron joins fellow campaign spokespeople Brittany Castro, CFP®, of Los Angeles; Rianka Dorsainvil, CFP®, of Washington, D.C.; and Justin Sullivan, CFP®, of Atlanta in encouraging young adults—particularly women and people of color—to pursue financial planning careers. These spokespeople are not only active online, they also participate in a variety of events throughout the year to help dispel misperceptions of the profession and highlight the benefits of financial planning careers. In August, for example, Sullivan attended the 14th Annual Conference of African American Financial Professionals, engaging attendees in conversation at the Center’s exhibit booth to promote CFP® certification and financial planning careers.

The campaign also features customizable toolkits that academic institutions and current CFP® professionals can use to promote financial planning careers to students and young people in their communities. The toolkits contain a variety of promotional materials and information on the Center’s career resources and opportunities available to young people, including scholarships, mentorships, internships and the online Career Center. These resources are available on CFP Board’s website at CFP.net/CFPro.

"I love the opportunity to connect with people to learn about their goals personally, professionally and financially. There is a cause and effect relationship to every decision our clients make, so providing them with the confidence that they are doing things right - and the peace of mind that they are going to be okay - is an amazing feeling."

Matt Aaron, CFP®

"I am a CFP® Pro" Spokesperson
Founding Partner, Aaron Financial



HIGHLIGHTED ACHIEVEMENT:**CFP BOARD MENTOR PROGRAM REACHES 3,200 ENGAGEMENTS**

The CFP Board Mentor Program continued to grow in 2019, with a record number of mentees connecting with mentors. The program pairs individuals pursuing CFP® certification with experienced CFP® professionals who guide them through the CFP® exam and the certification process. Mentors and mentees can be matched based on a variety of criteria, including gender, race and ethnicity. Mentors help mentees primarily with preparing for—and passing—the CFP® exam by focusing on time management, effective study strategies, staying motivated and managing work-life balance.

Mentoring engagements have covered education for the coursework requirement, exam preparation, entering the industry and experience for the CFP® certification. More than 1,100 mentor-mentee engagements

were facilitated in 2019, bringing the total number of engagements to over 3,200 over the life of the program.

The CFP Board Mentor Program is completely free for mentees, and it takes only a few minutes to sign up. For mentors, the program offers a wealth of resources to make the most of mentee relationships, including tools such as a step-by-step exam prep checklist. Both mentors and mentees have found the program to be valuable: Mentees benefit from developing impactful relationships with CFP® professionals, while mentors appreciate the opportunity to make a difference in someone's future and give back to the profession. Those interested in participating in the program are encouraged to visit CFP.net/Mentor.



Haley Tolitsky
Candidate for CFP® Certification

“My CFP® professional mentor has been my biggest cheerleader, helping me stay on track and motivated through the entire certification process. Because of her support, I passed the July 2019 CFP® exam!”



HIGHLIGHTED ACHIEVEMENT:**“WIN” ADVOCATES RAISE AWARENESS OF FINANCIAL PLANNING CAREERS AMONG WOMEN AND GIRLS**

More than 550 CFP® professionals are spreading the word nationwide that financial planning can be a rewarding career for women. Designated Women’s Initiative (WIN) Advocates by CFP Board, these professionals are speaking to local schools, women’s and girls’ groups, and professional associations in their communities about why they became a CFP® professional and why they love their job. Many also work to raise awareness of the importance of diversity within their own firms.

Additionally, WIN Advocates play a critical role in the Center’s development of partnerships with women’s advocacy organizations to attract more women into the financial planning profession. One of these partners is Rock the Street, Wall Street (RTSWS), a nonprofit organization dedicated to equipping girls to succeed financially and inspiring them to pursue careers in finance. In partnership with investment firms,

RIAs, foundations and schools across the country, RTSWS offers a year-long program of financial literacy workshops in the fall, mentorship in the spring and a Wall Street experience field trip. The Center’s partnership with RTSWS enables WIN Advocates to participate as mentors or instructors during five-week literacy-to-career programs for high school girls.

To date, more than 78 CFP® professionals have volunteered for RTSWS programs. By volunteering their time, WIN Advocates are providing young women with insight into what financial planners do, as well as valuable financial planning skills. In 2019 alone, CFP® professionals helped RTSWS reach 575 girls in 28 high schools across 15 U.S. cities. RTSWS found a 90% increase in financial literacy among these students, 75% of whom said they were likely to pursue a major or minor in finance or economics after completing the program.



Reshell Smith, CFP®

WIN Advocate

Transition Money Coach, AMES Financial Solutions, LLC

“It’s so important for women, especially minority women, to believe that a successful career in financial services is attainable. As a WIN Advocate, I have the opportunity to share my experiences and expertise with women who aspire to have a career in this industry. Women have the opportunity to disrupt this space, change the trajectory and thrive just as well as men.”



Sameer Somal, CFP®
WIN Advocate
CEO & Co-Founder, Blue Ocean Global Technology

“It is a great honor to volunteer and serve our profession through the WIN Advocate program. Empowering young women with the confidence and knowledge to become tomorrow’s financial planning industry leaders is a cornerstone to CFP Board’s industry stewardship. The initiative affords me opportunities to mentor, inspire and positively impact the future of our profession. By mentoring today’s brightest students and young professionals, we are investing in the future of America and keeping families on the road to financial independence.”

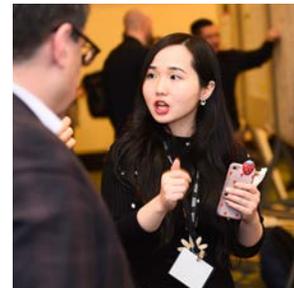
LOOK AHEAD

2020 Diversity Summit - The Center’s third Diversity Summit will be held virtually on November 18 and 19. To build on progress made by the first two Diversity Summits, the 2020 convening will focus on the sustainability of diversity and inclusion programs and initiatives. The agenda will highlight examples of diversity and inclusion efforts that have been deemed sustainable in terms of their ability to create and maintain change based on measurable metrics driven by top-down and bottom-up accountability. A new thought leadership paper featuring case studies of successful, sustainable diversity and inclusion practices will also be released and presented at the 2020 Summit.

KNOWLEDGE FOR PRACTICE

ELEVATING FINANCIAL PLANNING AS A RECOGNIZED ACADEMIC DISCIPLINE WHILE PROVIDING PRACTITIONERS WITH CUTTING-EDGE KNOWLEDGE

The financial planning profession faces a shortage of financial planning faculty and academic programs that can prepare the next generation of advisors. To address this challenge, the Center is working to elevate the academic discipline of financial planning to both encourage more educational institutions to recognize financial planning as a mainstream major and increase the stature of financial planning faculty and programs. This in turn provides more opportunities for cutting-edge academic research, enabling practitioners to access best practices and information on emerging trends so they can provide outstanding, current advice to their clients.



FEATURED ACHIEVEMENT:**FINANCIAL PLANNING REVIEW SURPASSES 37,000 DOWNLOADS**

Financial Planning Review, published by Wiley, seeks to maximize academic impact through the publication of rigorous and relevant research through a timely double-blind peer-review by respected researchers from a variety of subject areas. The *Review* has published 6 installments since launching in September 2018. With a selective acceptance rate of less than 10%, the *Review* features high-quality scholarly research on topics that relate to financial planning practice, including rigorous empirical and methodological analyses.

Papers presented in the *Financial Planning Review* cover topics such as portfolio choice, behavioral finance, household finance, psychology and human decision-making, consumer finance and regulation, human sciences, and financial therapy, literacy and wellness. The most recent edition of the *Review*, Volume 3, Issue 1 released on April 22, 2020, included the following papers:

- Know Thyself Financially: How Financial Self-Awareness Can Benefit Consumers and Financial Advisors
- Personality, Ideology, and Money Attitudes, As Correlates of Financial Literacy and Competence
- Recruiting, Selecting, Retaining, and Monitoring Successful Investment Managers: A Review of a Scattered Literature
- Financial Advice and Discretion Limits
- Utilizing Family Systems Theory in Financial Therapy

To date, 6 installments of issues of *Financial Planning Review* have been published. Reader interest has remained strong since the journal's official launch in the fall of 2018: The *Review* generated 37,000 downloads since its debut. Academic journals carried by John Wiley & Sons typically average 8,000 downloads in one year. Each edition of the *Review* is sent to the more than 87,000 CFP® professionals and more than 300 colleges and universities with a financial planning program, in addition to being distributed via the Wiley Online Library.



“Since its launch in 2018, Financial Planning Review has begun to establish itself as a respected peer-reviewed academic journal. We are proud of our distinguished editorial board and paper acceptance rate of under 10%. Our vision for this interdisciplinary journal is to bring robust research from a variety of academic disciplines to answer important questions that directly or indirectly relate to the practice of financial planning. Our 37,000 paper downloads indicate that the Review is starting to have the impact that we envision.”

Vicki Bogan, Ph.D.
Institute for Behavioral and Household Finance, Cornell University

Christopher Geczy, Ph.D.
The Wharton School,
University of Pennsylvania

John Grable, Ph.D.
University of Georgia

Writing in the September edition of the *Review*, Executive Editor Dr. Charles Chaffin and Co-Editors Dr. Vicki Bogan, Dr. Chris Geczy and Dr. John Grable said, “The process of developing a ‘home’ for rigorous research from a diverse group of academic disciplines and research traditions—all of which impacts financial planning practice—was not easy... We are grateful to the readership of this new journal, many of whom are scholars from a diverse group of academic disciplines, as well as an ever-growing group of CFP® professionals and other practitioners.”

A special FinTech issue will be among the *Review* editions published in 2020. The special issue, with Guest Editor David Musto of Wharton, will present the latest research in financial technology and innovation that encompasses the *Review*’s eight major content areas, and directly or indirectly relates to financial planning practice.

Financial Planning Review has also announced the COVID-19 and Financial Planning Special Issue. More information can be found at the Wiley Online Library.

HIGHLIGHTED ACHIEVEMENT:

CENTER HOSTS FOURTH ANNUAL ACADEMIC RESEARCH COLLOQUIUM

Following diligent preparations in 2019, the Center proudly hosted its fourth annual Academic Research Colloquium for Financial Planning and Related Disciplines from February 20-22, 2020, in Arlington, Virginia. Hundreds of distinguished researchers, leading scholars, graduate students and practitioners participated in this meeting showcasing emerging research within or related to financial planning theory and practice.

The 2020 Colloquium featured presentations of 23 research papers by scholars from a wide range of institutions, five of which won Best Paper Awards for outstanding contributions to innovation and knowledge in the financial planning profession:

- **The TD Ameritrade Best Paper Award in Behavioral Finance** – Sung Lee of Stern School of Business, New York University, for “Fintech Nudges: Overspending Messages and Personal Finance Management”
- **The Northwestern Mutual Best Paper Award in Insurance/Risk Management** – Hossein Salehi, CFP® of California Lutheran University, and Charlene Kalenkoski, CFP® of Texas Tech University, for “The Relationship Between Ownership of Insurance Products and Retirement Satisfaction”

- **The Emerging Scholar Best Paper Award** – Derek Tharp, CFP® of University of Southern Maine, for “Consumer Perceptions of Financial Advisory Titles and Implications for Title Regulation”
- **The Best Paper Award in Investments** – Da Ke of University of South Carolina, for “Left Behind: Partisan Identity and Wealth Inequality”
- **The Best Paper Award in Household Finance** – Nick Pretnar, Alan Montgomery, and Christopher Olivola of Tepper School of Business, Carnegie Mellon University, for “A Structural Model of Mental Accounting”

Another 30 research posters were featured during the Colloquium’s poster sessions. Other Colloquium highlights included insightful keynote addresses by esteemed scholars, compelling panels on top-of-mind subjects such as FinTech, interviews for open financial planning faculty positions, and practitioner-focused sessions that explored implications of research for daily practice.



Gina L. Hall, CFP®, CRPC®, CPFA, MPAS
Wealth Management Advisor, Merrill Lynch Wealth Management

“This is a great event, and I highly recommend attendance by both researchers and practitioners! Our profession depends on this type of collaboration.”

HIGHLIGHTED ACHIEVEMENT:**FINANCIAL PLANNING TEACHING PROGRAM PREPARES 100 INSTRUCTORS**

A total of 100 current faculty and prospective teachers received training through the Financial Planning Teaching Seminar by the end of 2019. Offered by the Center and the Columbia University School of Professional Studies, the experience-based seminar provides instruction on the fundamentals of financial planning, as well as training on basic instructional design, the use of learning objectives, student assessment and methods for incorporating experiential design into the classroom or an online setting. The course was held on campus at Columbia University in New York City from May 5-7 and August 17-20, 2019.

Seminar participants included current finance and accounting faculty, as well as instructors in CFP Board Registered Programs; CFP® professionals interested in a full- or part-time teaching career; and doctoral students aspiring to prepare the next generation of financial planners. In addition to giving these individuals an opportunity to develop and hone their teaching skills, the seminar provides participants with access to a robust library of teaching resources to help them enhance financial planning instruction. Seminar graduates are also able to submit their resume and/or CV for consideration for a teaching position at a college or university with a CFP Board Registered Program.



Lillian Padula-Coscia, CFP®

“The speakers were very interesting, and I felt I learned a lot from them sharing their years of experience with us. It definitely jump-started a teaching career for someone with little experience in academia. The class was also an excellent networking opportunity. Highly recommended.”

HIGHLIGHTED ACHIEVEMENT:**ONLINE FINANCIAL PLANNING COURSE DRAWS NEARLY 30,000 YOUNG ADULTS**

At the end of 2019, almost 30,000 students enrolled in Financial Planning for Young Adults, a massive open online course. Developed in partnership with the University of Illinois, the course is available at no cost and designed to provide an introduction to

basic financial planning concepts for young adults. The course is organized across eight separate modules within a 4-week window. Topics covered include financial goal setting, saving and investing, budgeting, financial risk, borrowing and credit.

HIGHLIGHTED ACHIEVEMENT:**CLIENT PSYCHOLOGY TAKES INTERDISCIPLINARY APPROACH TO FINANCIAL PLANNING PRACTICE**

The Center and the Aresty Institute of Executive Education at The Wharton School of the University of Pennsylvania led two successful sessions of the new Client Psychology course in 2019, with close to 50 participants. The first session took place April 1-3 at the University of Pennsylvania campus in Philadelphia, while the second session took place July 29-31 in San Francisco. Course content is based in part on *Client Psychology*, the second title in the Center's financial planning book series published by John Wiley & Sons.

Co-led by Dr. Chris Geczy at The Wharton School and Dr. Charles Chaffin of the Center for Financial Planning, the program participants delve into studies that merge traditional financial knowledge with best practices from finance, financial planning and human sciences, exploring the biases, behaviors and perceptions that impact client decision-making and financial well-being. The goal of the course is to help financial planners better understand their clients' psyches, which allows them to improve their client communications and build stronger long-term relationships.



Tracy Silpe, CFP®
Financial Advisor, Raymond James

"I would recommend this program to anyone with a practice that encompasses financial planning and trying to get better at the practice."

LOOK AHEAD

Financial Planning Knowledge Center - The highly anticipated Financial Planning Knowledge Center is in development, with a new website manager on board to lead the project. This new website will be the authoritative, go-to resource for the financial planning profession, providing a space for CFP® professionals, faculty and students to share ideas and research and helping practitioners apply this information to better serve their clients. The website will feature content from the *Financial Planning Review*, CFP Board, Bloomberg, FPA® and the Social Science Research Network, as well as additional papers, videos and interactive capabilities that present innovative research on financial planning and related disciplines.

ENGAGING THE PROFESSION

CENTER INITIATIVES INFORMED BY VOLUNTEER ADVISORS

The Center's work in each of our three focus areas—Talent Pipeline, Diversity and Inclusion, and Knowledge for Practice—is informed by a group of advisory bodies composed of some of the most talented and dedicated thought leaders from within and outside the financial planning profession. Members of these advisory bodies play an important role by providing guidance and recommendations on setting the Center's agenda and shaping its programming.

Advisory Council

The Center's Advisory Council, created in 2016, is the overarching advisory body for the Center. It provides guidance and recommendations concerning the Center's programmatic initiatives, including the need for particular initiatives, the prioritization of proposed initiatives and the measurements of success. This work is done in collaboration with the Center's other advisory groups. Advisory Council members are leaders in the profession, subject matter experts, key patrons, or academicians who possess experience relevant to the Center's mission, financial planning profession or the financial services industry.



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Development Committee

The Center's Development Committee is composed of key industry advocates and leaders who provide guidance and support in raising the necessary funds to implement the Center's programming. The Development Committee's critical work ensures the growth and sustainability of the Center's programmatic initiatives and fosters meaningful relationships with our generous sponsors and donors. The committee advised and supported the Center's successful capital campaign and is now focused on supporting an annual fundraising framework to ensure the Center's long-term sustainability.



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Karen P. Schaeffer, CFP®
Chair, 2015-March 2020
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Center Recognizes Karen Schaeffer, CFP®, as Outgoing Development Committee Chair

The Center extends a special thank you to Karen P. Schaeffer, CFP®, for serving as the inaugural chair of our Development Committee. Karen spearheaded the original capital campaign that made the Center's launch possible and raised \$12 million to support and grow Center programming. The Center is tremendously grateful to Karen for her total dedication to our profession and endless volunteerism, which includes continuing to serve on the Development Committee as its immediate past chair.

Charlie Fitzgerald, III, CFP®, another staunch supporter of the Center and advocate for our profession, assumed the role of committee chair at the beginning of 2020. The Center thanks Charlie for embracing this responsibility and working to push our development efforts to new heights.

Workforce Development Advisory Group

Formed in 2017, the Workforce Development Advisory Group is responsible for advising the Center's efforts to improve the health of the talent pipeline by attracting and developing the next generation of financial planners. The group is composed of experts on talent acquisition and retention, leaders from financial services firms, heads of CFP Board Registered Programs, and outside experts and researchers. Members of the group played an important role in developing the Center's 2019 *Financial Planning Career Paths* guide for employers.



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Women's Initiative (WIN) Council

Created in 2013, the WIN Council is composed of experts in the areas of women's issues, diversity and recruitment, as well as leaders from financial planning and advisory firms and CFP Board Registered Programs. The WIN Council advises the Center on the development of initiatives and assists in the development of initiatives to increase the number of women entering the financial planning profession, including the number of women CFP® professionals. The WIN Council has played an important role in developing key Center programs, including WIN Advocates, the "I am a CFP® Pro" campaign and the CFP Board Mentor Program, as well as partnerships with organizations such as Invest in Girls and Rock the Street, Wall Street.



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Diversity Advisory Group

The Center established the Diversity Advisory Group in 2017 to provide recommendations on the development of diversity, equity and inclusion initiatives that would increase the number of racially and ethnically diverse CFP® professionals. Diversity Advisory Group members possess experience or talents aligned with the Center's mission, including expertise and/or leadership in the areas of diversity and recruitment, experience working as a financial planner or in the financial services industry, or academia. The Diversity Advisory Group played a key role in the Center's 2018 and 2019 Diversity Summits and studies of diversity within the financial planning profession. The group is currently advising the Center on the development of new diversity research and the 2020 Diversity Summit.



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The *Financial Planning Review* editorial board consists of leading scholars from both within financial planning and other disciplines such as finance, accounting, marketing, and household finance. Founded in 2017 ahead of the release of the first issue, the *Financial Planning Review* editorial board provides strategic guidance regarding the aims and scope of the journal, as well as a rigorous peer-review process of all paper submissions. Editorial board members represent Ivy League, research-1, and a variety of other institutions across North America and Europe.

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CENTER PARTICIPATES IN INDUSTRY EVENTS AND MEETINGS

- Center Convenes Diversity, Equity and Inclusion Leaders:** On June 25, the Center hosted a first-of-its-kind convening for diversity, equity and inclusion leaders from financial planning firms to network and discuss avenues for addressing the lack of racial diversity in the profession. The event provided an unprecedented platform for collaboration and exchange of ideas, including case studies for advancing diversity that were highlighted during the 2019 Diversity Summit.
- InvestmentNews 2019 Women to Watch Awards:** Karen Schaeffer, CFP®, immediate past chair of the Center's Development Committee, was honored with the Alexandra Armstrong Award for Lifetime Achievement in Financial Planning at the 4th Annual *InvestmentNews* Women to Watch Awards on March 14, 2019 in New York City. Karen received the prestigious award for her distinguished career and contribution to the growth and advancement of financial planning. Among other CFP® professionals who were recognized were key Center volunteers—WIN Council members Sabrina Lowell, CFP®, and Angela Ribuffo, CFP®, and “I am a CFP® Pro” campaign spokeswoman Brittney Castro, CFP®.



- **2019 FINRA Diversity Summit:** Marilyn Mohrman-Gillis, the Center's then executive director, spoke about the Center's research and recommended initiatives to advance racial diversity in the profession on a panel at the 2019 FINRA Diversity Summit. Held on April 2 in New York City, the annual event drew nearly 150 participants from nonprofits, broker-dealer firms and regulators for a discussion about FinTech and its impact on diversity and inclusion, innovative approaches for building inclusive talent pipelines, and the financial capability of U.S. adults.
- **FPA® Annual Conference:** Marilyn Mohrman-Gillis and Mark Tibergien, chair of the Center's Workforce Development Advisory Committee, led a special breakout session about career paths in financial planning at the FPA® Annual Conference in Minneapolis, Minnesota from October 16-18. They discussed the *Financial Planning Career Paths* guide and other Center initiatives to attract the next generation of financial planners. Conference attendees had an opportunity to meet with the Center's leadership at a breakfast event and an exhibit booth to learn about Center initiatives and how to get involved. The FPA® conference draws more than 2,000 attendees from over 20 countries each year.
- **InvestmentNews Women Adviser Summit:** Center Special Adviser on Gender Diversity Jocelyn Wright, CFP®, delivered remarks at the *InvestmentNews* Women Adviser Summits in Boston on July 9 and San Francisco on October 22. Wright issued a call to action for the profession, discussing the need to make more room for women financial planners and sharing practical tactics for making the profession more supportive and welcoming to women. Wright, WIN Council member Erin Voisin, CFP®, and WIN Advocate Reshell Smith, CFP®, also participated in the summits' financial literacy panels.
- **14th Annual Conference of African American Financial Professionals:** Jocelyn Wright, CFP® participated in a panel at this annual meeting of The American College of Financial Services from August 5-7 in Atlanta. Attendees also had the opportunity to meet "I am a CFP® Pro" campaign spokesperson Justin Sullivan, CFP®, and learn about the benefits of CFP® certification and Center resources—as well as the joint scholarship program offered in partnership with The American College—at our exhibit booth. This dynamic event typically draws about 600 African American financial services professionals.



MESSAGE TO 2019 CONTRIBUTORS

As you've read in these pages, 2019 was an important year for the Center—one marked by expanding programs, partnerships, thought-provoking research and profession-wide engagement. We continued to challenge our profession's status quo and made important progress in improving the health of our talent pipeline, fostering greater diversity and inclusion within our workforce, and increasing the quality of practitioners' knowledge and insights.

It is the generosity of our passionate supporters that makes these accomplishments possible. We remain ever grateful to our corporate sponsors, including Lead Founding Sponsor TD Ameritrade Institutional and Founding Sponsors Northwestern Mutual, Envestnet and Charles Schwab Foundation, in partnership with Schwab Advisor Services. We also thank 4,479 individual donors who have shared their treasure with us.

Your contributions are helping the Center create a more diverse and sustainable financial planner workforce and a research-based, recognized body of knowledge for financial planning. A special thank you goes to David Diesslin, CFP®, chairman of The Deena Jo Heide-Diesslin Foundation and the Center's first million-dollar individual donor. Part of David's wonderful contribution continues funding The Deena Jo Heide-Diesslin Foundation Challenge Match Scholarship, which supports students from populations that are underrepresented in the financial planning profession and/or who have demonstrated financial need.

As we write this in the spring of 2020, we know that the last several months have been unsettling and that this is a difficult time. It is important that you take care of yourself, your staff and your businesses so that you can continue to provide outstanding service to your clients in this time of need. But if you are able, we hope you will consider contributing to the Center to build on our achievements and increase momentum for the future. We welcome one-time contributions, multi-year pledges and longer-term options, such as including the Center in your estate or financial plans. All of these ways to support the Center enable you to have a powerful and lasting impact on our work and our profession.

There are also other ways to become involved in the Center's work. Your time and talent are incredibly valuable. You could volunteer to mentor an aspiring CFP® professional through the CFP Board Mentor Program, join a scholarship review committee, become a WIN Advocate to encourage women and girls to consider financial planning careers, or help promote the profession among young people through the "I am a CFP® Pro" campaign, to name a few opportunities.

By supporting the Center, you will be part of a unified effort bringing all corners of the financial planning profession together to address the challenges we face. We know these challenges are larger than any one financial services firm, organization or individual can tackle on their own. But we also know that if we pool our resources and leverage the power of collaboration, we can meet the increasing demand for financial planning advice and ensure our profession thrives to its fullest potential for years to come.

Thank you again. We hope we can count on your continued support.



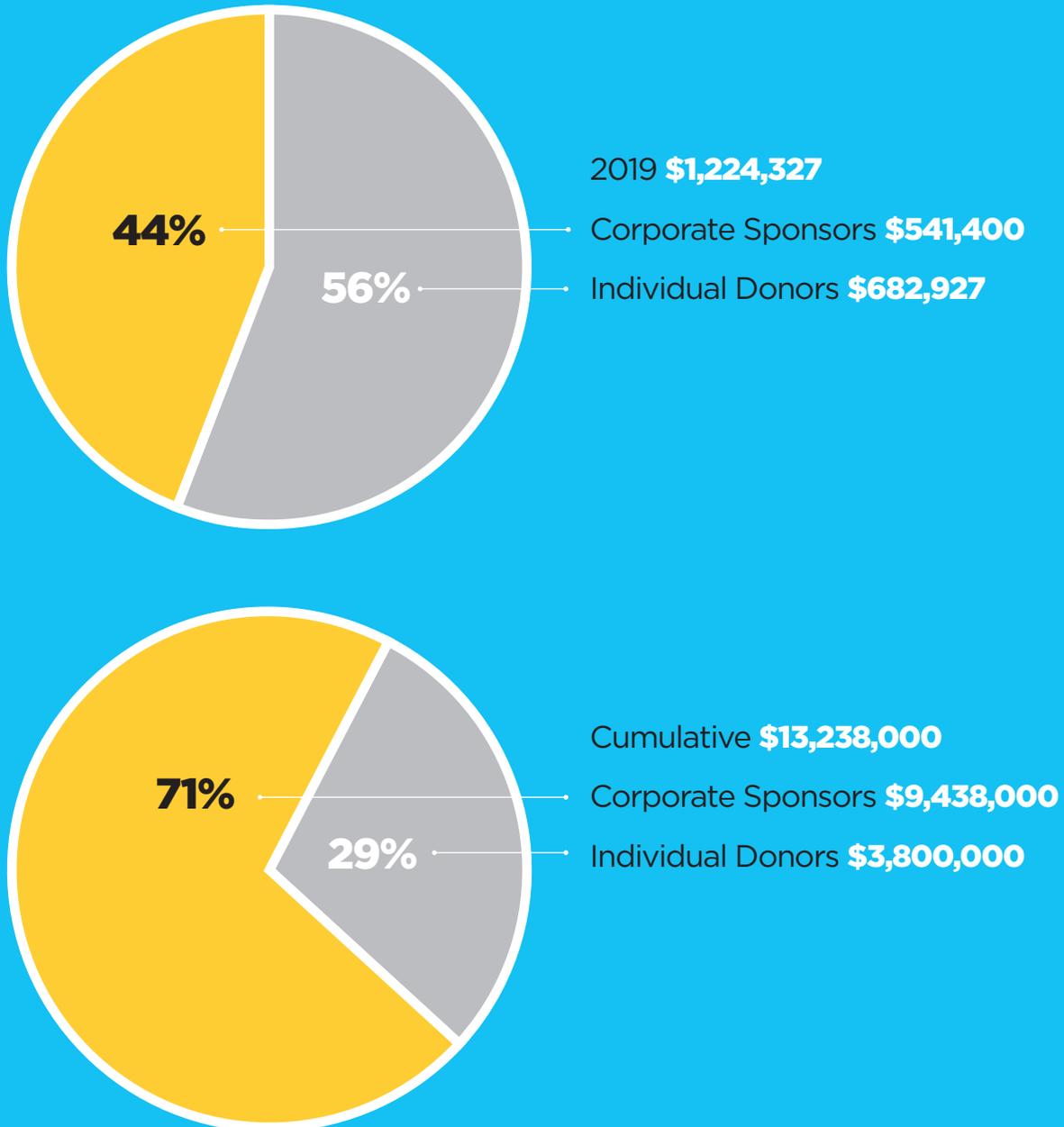
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REPORT ON GIVING

Cumulative giving as of the end of 2019 totaled \$13,238,000.



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Charles Goldman
President & CEO, AssetMark, Inc.

“AssetMark is proud to support the work of the Center to harness the next generation of financial planners and equip them with the necessary knowledge and skills to excel and effectively serve clients. We are pleased to be a partner in this important work to advance the profession of financial planning.”



Jon Cleborne
Principal and Head of Personal Advisor Services, Vanguard

“Vanguard’s client-centric culture is uniquely focused on fulfilling our mission of giving investors the best chance for investment success. We believe that advice can help investors achieve better outcomes, and the CERTIFIED FINANCIAL PLANNER™ certification gives advisors a strong foundation for helping clients attain their goals. Vanguard is proud to partner with the Center for Financial Planning and support its important efforts to grow and diversify the financial planning industry.”



The Center's new Donor Wall recognizes the visionaries who make our programs possible. On March 11, 2020, we celebrated the generosity and commitment of the Center's donors and sponsors during our Donor Wall unveiling event. All corporate sponsors and individual donors who have given \$25,000 or more in gifts and pledges to the Center through the end of 2019 are featured on the wall, and the design will be updated on an annual basis.



Ray Ferrara, CFP®
CEO, ProVise Management Group, LLC

"I'm proud to be a donor and volunteer leader for the Center for Financial Planning. There is simply no better way to be part of the solution to elevating our profession's value, talent, knowledge and growth."



Tim Kochis, CFP®
Founder, Kochis Global

"The Center is a great place to dedicate philanthropy because it provides a tangible way to give back to the profession. I am proud to provide support because I know it will greatly enhance our profession. Looking to the future, with the Center's effort, we can be even more helpful to an even broader community."

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Thank you to the following individuals who have generously supported the Center.

* = Multi-year Pledge

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"I've had a successful career in financial planning, so when I was getting ready to retire and sell my business, I was thrilled to donate a percentage of the proceeds from the sale to the Center to become a Legacy Donor. I am confident that the Center will put this money to good use to transform and elevate our profession, benefiting not only the future generation of financial planners, but also future generations of Americans."

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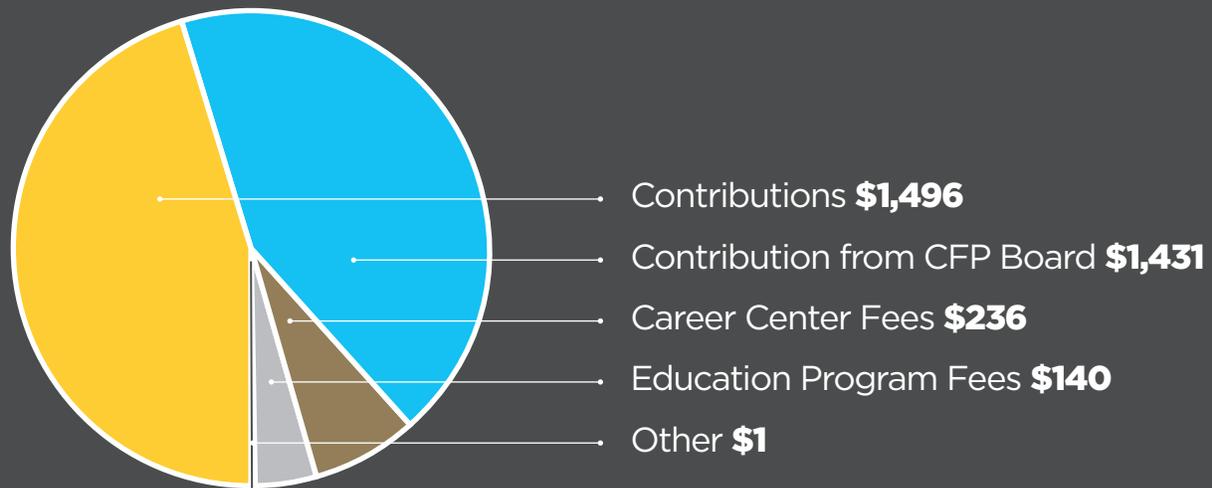
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2019 FINANCIAL REPORT

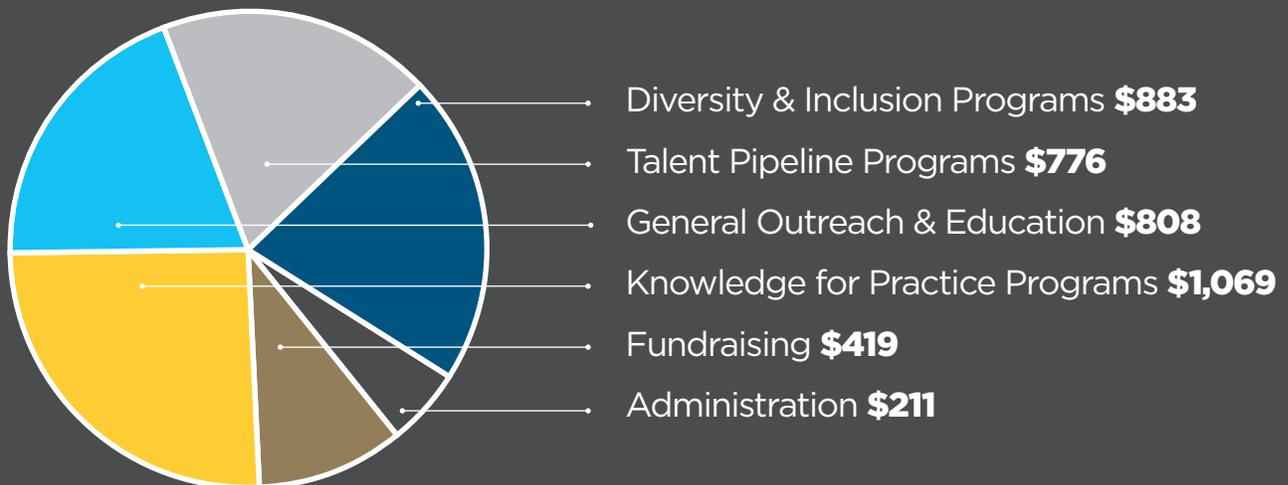
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Amounts (\$000s)



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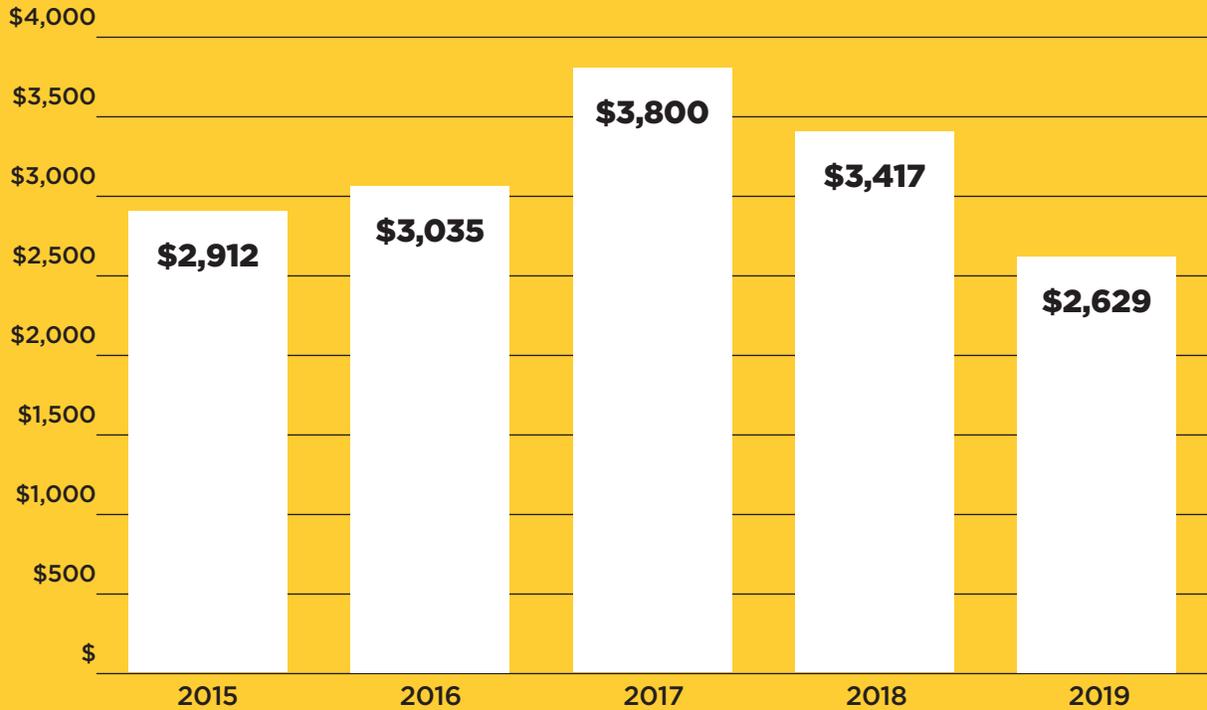
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*Operating revenues reflect support from donors, revenues from programs and CFP Board's financial support for the Center. Contributions in 2019 differ from total reported giving on page 37 due to required accounting adjustments made for multi-year gifts.

NET ASSETS*

as of December 31, 2019. Amounts (\$000s)



*During 2019, the Center utilized purpose-restricted contributions received in prior years to fund 2019 activities that met those restrictions. As a result, net assets for the Center decreased as those resources were used between 2018 and 2019.

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