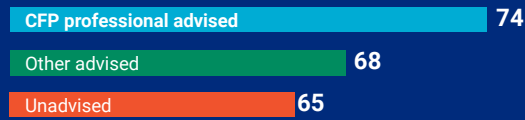


Value of Financial Planning

People who work with a CFP® professional say they are better off

FPSB® Value of Financial Planning Index™ measures the impact of financial planning on the lives of clients, with scores ranging from 0 to 100.

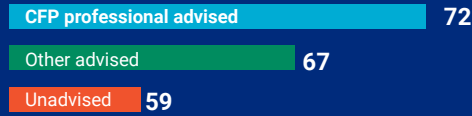
Experience a higher quality of life:
Feel better about their health, connection, purpose and life satisfaction



More satisfied with their financial situation:
Feel better about their spending capability, personal financial risk management, and overall wealth



Greater financial confidence:
Feel more confident about their financial security and ability to achieve their personal financial goals



Better experience with the financial planning process:
Feel more optimistic about meeting their financial needs and achieving financial gains



Top 5 benefits of working with a financial planner reported by clients

- 1** Improved financial wellbeing and peace of mind
- 2** Help to explain and simplify financial matters
- 3** Better financial decision-making confidence
- 4** Improved financial freedom and control
- 5** Help to establish and achieve goals

CFP professionals unlock benefits beyond money

80% agree financial planning helps fulfill life dreams

70% feel they cope better when faced with health issues

61% say financial planning positively impacted their family life

54% report financial planning positively impacted their mental health

96% of clients trust CFP professionals to act in their best interests

Financial planning is a top priority for Gen Y

