



# FOUNDATION FOR FINANCIAL PLANNING

## Who We Are

The Foundation for Financial Planning, a nonprofit charity, is the only organization solely devoted to supporting the delivery of pro bono financial planning.

As the **financial planning profession's foundation**, the Foundation reaches out to financial planners and the companies that provide support and products for planners, for tax-deductible contributions in order to support its mission.

## Call to Action

In response to the need to assist the Foundation's mission to connect the financial planning community with people in need, **Fidelity Investments®** will **match pledges** of \$1,000 or more. **DONATE TODAY and pay over 5 years or make a onetime gift!** Join us and support pro bono financial planning at [www.foundation-finplan.org](http://www.foundation-finplan.org). **IT MATTERS!**

## Our Mission

Founded in 1981 and reorganized in 1996, the Foundation's mission became one of resource development and grant making and has since provided more than \$5.3 million in grants to support pro bono financial planning advice. Our mission is to help people take control of their financial lives by connecting the financial planning community with people in need.

We support pro bono financial planning through grants and community based organizations that work with the underserved, which includes active military, veterans, victims of disasters, low- to moderate-income families and many others.

## Our Impact

Delivery of pro bono financial planning enriches the lives of everyone touched by it ...the recipients, the financial planning volunteers, donors and society as a whole. We believe that **financial planning matters**. It allows people to make better financial decisions. However, not everyone has access when they need it. The Foundation is the connector between the underserved and the financial planning profession.

## Greater Need for Pro Bono Financial Planning

Early in 2013 the Financial Planning Association requested the Foundation to manage and facilitate their pro bono outreach work with FPA Chapters. Our years of working with the Chapters and FPA made this a natural transition and we are now providing pro bono financial planning opportunities to a greater audience. Through this partnership, to date the Foundation has:

- Worked with 1,710 pro bono financial planners, who volunteered 15,407 hours
- Served more than 14,722 underserved individuals

**While the Foundation maintains a close relationship with FPA and other financial services organizations, it is an independent 501 (c) (3) nonprofit organization.**

As of February 28, 2014

