



Value of Financial Planning

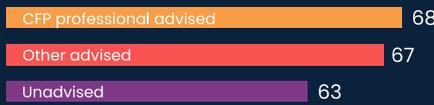
People who work with a CFP® professional say they are better off

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



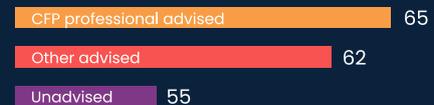
Experience a higher quality of life:

Feel better about their health, connection, purpose and life satisfaction



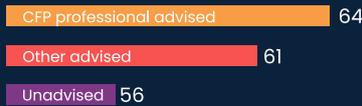
More satisfied with their financial situation:

Feel better about their spending capability, personal financial risk management, and overall wealth



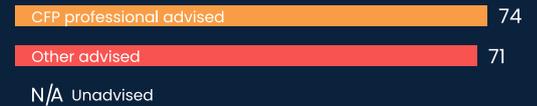
Greater financial confidence:

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 Better financial decision-making confidence



2 Improved financial wellbeing and peace of mind



3 Saves time and effort organising finances



4 Help to explain and simplify financial matters



5 Feel more satisfied with their wealth

CFP professionals unlock benefits beyond money



73% agree financial planning helps fulfill life dreams



68% feel they cope better when faced with health issues



40% say financial planning positively impacted their family life



45% report financial planning positively impacted their mental health

Clients trust financial planners to act in their best interests

93% of all financial planning clients

95% of CFP professional clients

Financial planning is a top priority for Gen Y

