

CREATING  
A MORE  
**DIVERSE &  
SUSTAINABLE  
PROFESSION**



**BUILDING A  
TALENT PIPELINE**



**FOSTERING  
DIVERSITY, EQUITY  
AND INCLUSION**



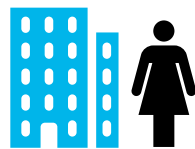
**ADVANCING  
KNOWLEDGE  
FOR PRACTICE**

**OUR IMPACT**



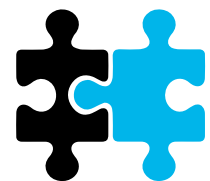
**100%**

Increase in the number  
of CFP® professionals  
under age 30 since 2016



**30%**

Proportion of new  
CFP® professionals in 2022  
who are women

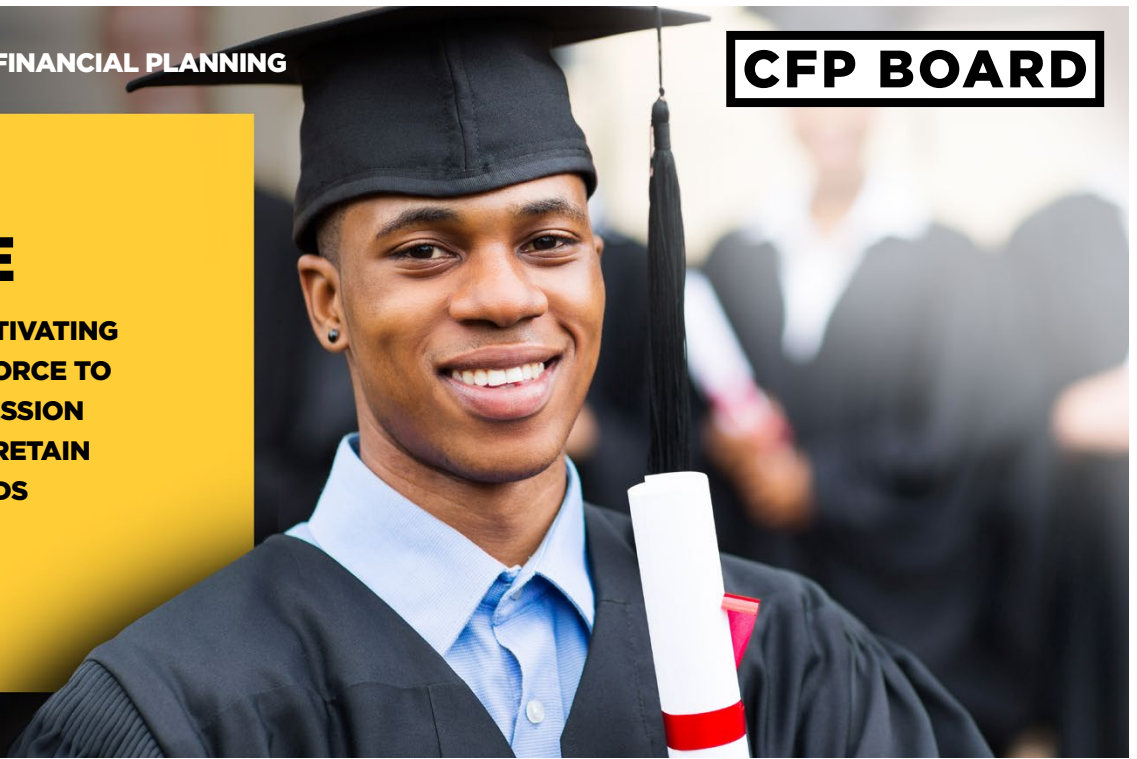


**15%**

Proportion of new  
CFP® professionals in 2022 who  
are racially and ethnically diverse

# TALENT PIPELINE

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



**\$1.3M+**

Awarded through 295 scholarships across 18 different programs



**938**

Jobs and internships added to the CFP Board Career Center in 2022



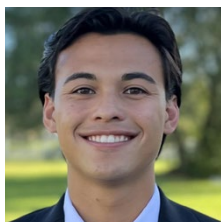
**1,525**

New accounts created in 2022 by individuals requesting the *Guide to Careers in Financial Planning*



**476**

Job seekers connected with 65 employers at 2 Virtual Career Fairs in 2022



**CORRIGAN GARCIA**

Undergraduate Student, Texas A&M University, 2022 Investnet Scholarship Recipient

“I decided to become a financial planner because I believe that it is an honor to be the guide that helps people navigate through financial decisions and the architect that helps individuals build the future they want for themselves and their families. Receiving the Investnet Scholarship will help me be my best in that work by furthering my education and supporting my pursuit of CFP® certification.”



**SHEILA C. LAWRENCE, MALD, CFP®, CAP®**

Partner & Senior Client Advisor, Ballentine Partners

“The Center’s Virtual Career Fairs have proven to be valuable in attracting qualified candidates to our firm. Participating in the fairs enabled us to directly engage with new talent, and encourage them to apply to open positions.”

# DIVERSITY, EQUITY AND INCLUSION

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



**KAMILA ELLIOTT, CFP®**  
Former CFP Board Chair



**300+**

Attendees participated in the 5<sup>th</sup> annual Diversity Summit in 2022



**94%**

Rate of post-event survey respondents who said they were very satisfied with their Summit experience



**475+**

CFP® professionals who educate women and girls about financial planning career opportunities as WIN Advocates



**140**

Students participated in the CFP® Pro Campus Champions Program at 3 universities: Clark Atlanta University, Prairie View A & M University and University of Houston



**SCOTT LEWIS, CFP®**  
Advisory Services Team Leader, Asset Mark

“After attending this [Diversity Summit], I realize that my career purpose is much bigger than just my activities at work. I feel called to make a much broader impact at my firm and in this industry.”



**SARA STANICH, CFP®, CDFA®, CEPA**  
Founder, Cultivating Wealth

“The financial planning profession has so much to offer in terms of career opportunities for next-generation advisors. As a WIN Advocate, I really enjoy sharing the benefits of a financial planning career with the women in my community and doing my small part to help our profession grow.”

# KNOWLEDGE FOR PRACTICE

THE CENTER IS ELEVATING FINANCIAL PLANNING AS A RECOGNIZED ACADEMIC DISCIPLINE IN COLLEGES AND UNIVERSITIES.



**JUSTIN FITZPATRICK, PH.D., CFA, CFP®**  
Co-Founder & CIO, Income Lab,  
delivers keynote address at ARC 2022.



**16**

Issues of *Financial Planning Review*, the profession's double-blind, peer-reviewed academic journal



**190K+**

Cumulative downloads of *Financial Planning Review*, including more than 40,000 in 2022



**102**

Leading academicians, researchers and practitioners convened at the 6<sup>th</sup> annual Academic Research Colloquium in 2022



**28**

Original research papers presented at the 2022 Colloquium, of which 7 received a Best Paper Award



**CONGRONG OUYANG, PHD**

Assistant Professor,  
Kansas State  
University

"[This is the] best conference to learn about cutting edge research in financial planning, interact with the best researchers in the field, and get inspired about improving your practice and your research."



**DIETER BOLLMANN, CFP®**

Managing Partner,  
Dundas Wealth  
Management LLC

"The ARC is an absolute must for any practitioner who wants to be on the cutting edge of financial planning and integrate the latest research into their practice to benefit their clientele."

# MAKE AN IMPACT TODAY

The Center's work to advance the financial planning profession depends on the generous donations of corporate and individual donors. Every cent of your contribution helps to create a more diverse and sustainable financial planner workforce and a research-based, recognized body of knowledge for financial planning. Give today at [CFP.net/SupportTheCenter](https://www.cfp.net/SupportTheCenter)

## WAYS TO GIVE

The Center welcomes one-time donations, multi-year pledges, gifts of securities, planned gifts and qualified charitable distributions. You may also donate in support of one or more of the following scholarship programs:

- **LECOUNT R. DAVIS, CFP® SCHOLARSHIP:** Our first endowed scholarship, this program honors the first Black CFP® professional, LeCount Davis, by supporting Black students and professionals pursuing coursework required for CFP® certification.
- **WOMEN'S INITIATIVE ENDOWED SCHOLARSHIP:** In celebration of WIN's 10th anniversary, this newly created scholarship is designed to support the next generation of women and femme CFP® professionals. The scholarship will assist qualified women/femme students and professionals who are seeking to complete the education coursework required for attaining CFP® certification at the undergraduate or certificate level.
- **THE DEENA JO HEIDE-DIESSLIN FOUNDATION CHALLENGE MATCH SCHOLARSHIP:** Supports individuals pursuing education coursework required for CFP® certification who are from underrepresented populations and demonstrate financial need. The foundation doubles your gift dollar for dollar.
- **RICHARD B. WAGNER MEMORIAL SCHOLARSHIP FUND:** Offered in partnership with the Financial Planning Association®, this fund helps individuals from underrepresented populations complete certificate-level education coursework required for CFP® certification.

## DONOR & SPONSOR RECOGNITION

The Center provides numerous opportunities to recognize our donors and sponsors. These may include:

- Access to CFP Board Career Center job postings and a searchable database of more than 6,000 candidate profiles
- Lead sponsorship of conferences, research and thought leadership papers
- Unique networking and thought leadership opportunities with leaders from firms, university faculty, and students during annual conferences
- Logo or name included on Donor Wall at CFP Board's Washington, DC headquarters and invitation to an associated VIP event
- Logo or name on Center web pages, resources, and event signage and promotions
- Acknowledgment in Center newsletters and/or email communications with CFP® professionals, CFP Board Registered Program directors and other stakeholders
- Name listing in the Center's Annual Report

For more information on giving options, contact Dan Limbago, Institutional Giving Officer, at:

[DLIMBAGO@CFPBOARD.ORG](mailto:DLIMBAGO@CFPBOARD.ORG)

202-379-2200

CFP Board recently established a new 501(c)(6) nonprofit professional organization. With this change, CFP Board will maintain two affiliated organizations, one entity with 501(c)(3) tax status and another with 501(c)(6) tax status. The 501(c)(6) organization will be called CFP Board of Standards. The 501(c)(3) organization will be called CFP Board Center for Financial Planning. The change does not impact donations and sponsorships to the CFP Board Center for Financial Planning. Donations to the Center remain fully tax deductible to the extent allowed by law.