

## What services are available?

- Seminars and workshops for individuals and families:
  - ✓ basic financial literacy
  - ✓ budgeting
  - ✓ debt management
  - ✓ understanding insurance
  - ✓ building savings
  - ✓ customized programs
- Seminars and workshops for staff of partner organizations
- Individualized counseling
- Educational brochures

## Financial Planning Process

Establish Client-Planner Relationship and Expectations

Gather Data, including Goals and Objectives

Analyze and Evaluate client's financial status

Develop a Plan and Present Recommendations and Alternatives

Implement the Plan

Monitor the Plan



Contact your local FPA chapter at:

### Minnesota FPA

3900 Main St NE  
Minneapolis, MN 55421

Phone: 763-781-1212  
Email: [probono@fpamn.org](mailto:probono@fpamn.org)  
Website: [www.fpamn.org](http://www.fpamn.org)

### FPA's National Financial Planning Support Center

Phone: 800.282.PLAN (7526)  
Email: [fpaprobono@fpanet.org](mailto:fpaprobono@fpanet.org)  
Website: [www.FPAprobono.org](http://www.FPAprobono.org)

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FPA's *pro bono* programs are funded in part by generous grants from the Foundation for Financial Planning



## PRO BONO FINANCIAL PLANNING



*Helping those in need  
in times of need!*



## FPA's Pro Bono Programs

### Free help ... with no strings attached

Members of the Financial Planning Association® (FPA®) are available to offer *pro bono* assistance to those in need. FPA works closely with non-profit



and charitable organizations to create programs that address clients' needs. Whether providing educational seminars or individualized counseling, volunteers can assist victims of natural disasters, individuals with medical crises, military personnel dealing with long deployments and other qualified individuals, families and businesses.

### ***Unbiased financial advice with no sales or promotion of products or services***

FPA volunteers abide by prescribed guidelines and follow the financial planning process. They do not sell products or services while engaged in *pro bono* activities. There is no charge, no commitment, no pressure ... just unbiased financial advice.

### How can a financial planner help?

Many people think of financial planning as something for the wealthy or for active investors. In fact, it's much more than that. Financial planning involves all kinds of everyday money matters, such as designing a household spending plan, managing credit card bills, choosing insurance policies or refinancing a mortgage.

Financial planning means setting and reaching goals, now and in the future. It means getting one's financial life organized and working. From insurance claims and taxes to paying for children's education and planning for retirement ... an FPA volunteer can help qualified *pro bono* clients with all kinds of needs.

**The FPA of Minnesota chapter wants to “provide financial guidance to those in need or crisis.” We will work with individuals and non-profits to satisfy the needs of those desiring assistance in improving their financial lives.**

### Experts you can trust

The Financial Planning Association is the membership organization for the financial planning community, with 100 chapters and more than 28,000 members nationwide. FPA established its non-profit National Financial Planning Support Center in 2001 to offer *pro bono* services to victims of the September 11 attacks. Since then, *pro bono* services have grown nationally, and FPA volunteers have helped hundreds of people get their financial lives in order.

***“I want to help people improve their financial lives as a way of giving back to the community”***

**–Charles P. Buck, CFP®  
*pro bono* volunteer**

FPA *pro bono* services are provided by or supervised by CERTIFIED FINANCIAL PLANNER™ professionals. CFP® professionals must meet high training and experience requirements and abide by a code of ethics, further assuring their objectivity.

