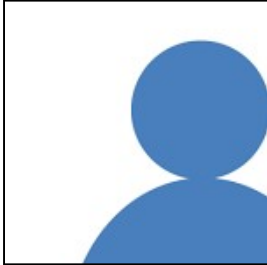


2019 PRO BONO - Plan of Work

FPA is the community that fosters the value of financial planning and advances the practice and profession of financial planning.



Director:	Tiffany Walker	Tiffany.walker@captrustadvisors.com
Vice:	TBD	TBD

Committee Members:

San Asato	Melanie Hardie		
Chris Cheney			
Steve Gilbertson			

PASSION STATEMENT

Making wise financial decisions aligned with one's values is a defining part of a fulfilling life. As such, we believe that every individual and family deserve access to quality financial planning services, regardless of their financial means or background.

We passionately serve the underserved members of our community. We believe that the most effective way to advance the practice and profession of financial planning is to share its power with those in need in our community, and that in doing so we **GROW** as much as we **GIVE**. This is why we actively work to build relationships with Community Based Organization (CBO) partners, connecting members of underserved communities with opportunities to engage in pro bono financial planning engagements with the nearly 300 qualified CFP® practitioner members of FPA of Minnesota.

3 MAIN STRATEGIES

As a guide, strategies are not specific projects.

Strategy 1	Provide EDUCATION , tools and resources for the community of CFP® practitioners to serve the unique needs of underserved communities and individual and families in times of crisis.
How will we communicate with our targeted audiences?	By providing educational content through regular workshops, participation in Twin Cities Financial Planning Day and vetted resources.

Tactics to Fulfill Strategy	Target Date	Committee Member(s) Spearheading	Value that should be Communicated
Pro Bono Workshop February 2019 – Effectively Managing Healthcare Costs	February 19	TBD	Tools and resources for providing financial planning to individuals and families facing a healthcare diagnosis.
Pro Bono Workshop June 2018 – Topic TBD	June 18	TBD	Tools and resources for providing financial planning to individual and families with a specific need commonly addressed in the context of a pro bono financial planning engagement.
Pro Bono Workshop September 2018 – Pro Bono Bootcamp	September 17	Tiffany Walker	Pro Bono Bootcamp – Fundamentals of facilitating a pro bono consultation.

Maintain vetted community resource list	Ongoing	Melanie Hardie	Provide referral organizations for advisors working with Pro Bono consultations.
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Ways to Integrate Ideas and Collaborate

How does what you do integrate with what other committees/organizations do?

Alliance	What can we provide?	What can they provide?
Foundation for Financial Planning	Access to volunteers, outcome stories.	Grant funding, access to a national network of CBO resources.
Financial Education Committee	Shared content and relationship management with Community Based Organizations.	Drive attendance at events containing both pro bono and financial education content, including TCFPD. Content, speakers and resources for events.
Career Development, Member Experience	A way to deepen a (new) member's connection with FPA.	Assistance with finding new CFP® practitioner volunteers and pro bono committee members.
PR Committee	Impact stories for newsletter and social media campaigns that illustrate the value of the financial planning profession to the public.	Increased visibility into pro bono committee efforts, with the goal of facilitating member engagement and volunteer recruitment.

Strategy 2	Connect our members with meaningful volunteer opportunities that will deepen their ENGAGEMENT with the COMMUNITY of other financial planning practitioners, GROW their planning skills/knowledge, and promote the profession of financial planning as they GIVE back to residents of the Twin Cities and greater Minnesota.
How will we communicate with our targeted audiences?	Through one-on-one interactions and public speaking opportunities at social, educational and volunteer events throughout the year, the FPA MN newsletter and social media accounts, through monthly and ad hoc email communications distributed by the FPA MN Volunteer Director, Preeti Sam.

Tactics to Fulfill Strategy	Target Date	Committee Member(s) Spearheading	Value that should be Communicated
Work with the Volunteer Director and Financial Education Committee to organize and promote volunteer engagement opportunities.	Ongoing	Tiffany Walker	When you GIVE of your time and talents, you GROW even more.
Twin Cities Financial Planning Day	October 26	All	Promote the value of pro bono financial advice within the Twin Cities community.
Pro bono committee member recruitment.	Ongoing	All	Being a pro bono committee member is a fun and fulfilling way to promote the practice and profession of financial planning.
Fully implement volunteer database, and inform technology integration efforts being undertaken by OneFPA as part of the OneFPA Network initiative.	Ongoing	Preeti Sam, Tiffany Walker	FPA MN will communicate regarding volunteer engagement opportunities in a consistent, targeted, efficient way.

Recognize and promote outcomes of volunteer activities in a timely manner.	Ongoing	Tiffany Walker, Preeti Sam	The efforts of our volunteer members are impactful and valued.
Include CBO's in volunteer appreciation activities.	Ongoing		We appreciate our community partners!

Ways to Integrate Ideas and Collaborate

How does what you do integrate with what other committees/organizations do?

Alliance	What can we provide?	What can they provide?
CFP Board/OneFPA	Commitment to the value of the CFP® designation, structured volunteer opportunities.	Technology and marketing tools to facilitate and support engagement with CFP® practitioners regarding pro bono volunteer opportunities.
Foundation for Financial Planning	Access to volunteers, outcome stories.	Grant funding, access to a national network of CBO resources.
Public Relations	Engaging success stories and content in a timely way.	Increased public awareness of and enhanced member engagement with FPA MN pro bono activities.
Member Experience	A meaningful way for CFP® practitioner members to deepen their engagement with FPA MN.	Opportunity to engage with FPA MN membership, assist with recruitment of volunteers.
Financial Education	Shared support of Volunteer Director activities.	Help organize and promote volunteer engagement opportunities.

Strategy 3	Develop new opportunities for our CFP® practitioners to offer pro bono advice to the public.
How will we communicate with our targeted audiences?	Initial introduction to new CBO partners through FPA MN committee members, ongoing quarterly contact with CBO's and Financial Education Committee.

Tactics to Fulfill Strategy	Target Date	Committee Member(s) Spearheading	Value that should be Communicated.
Support efforts of MSU Mankato Financial Planning program to develop pro bono financial planning content delivery in the greater Mankato area.	Ongoing	Tiffany Walker, San Asato	Growing FPA MN's presence in greater Minnesota and supporting the development of the next generation of financial planning practitioners is an important initiative for the organization.
Reach out to new organizations to grow our CBO partner network, and add the the list of community resources pro bono volunteers and recipients can access.	Ongoing	Chris Cheney	FPA MN can deliver pro bono financial planning as a supplement to the CBO's existing programming, and is an integral part of the Twin Cities and greater Minnesota community.
Coordinate CBO management with Financial Education Committee efforts.	Ongoing	Tiffany Walker	We need to deliver consistent value to our current CBO partners, and create an intra-committee structure that allows for accountability within each CBO relationship.

Ways to Integrate Ideas and Collaborate

How does what you do integrate with what other committees/organizations do?

Alliance	What can we provide?	What can they provide?
MSU Mankato	Logistical support, access to experienced CFP® practitioners and volunteers.	Collaboration with CBOs, volunteers and public relations.
Financial Education Committee	Collaboration with CBOs, volunteers and educational materials	Collaboration with CBOs, volunteers and educational materials.
PR Committee	Content to share regarding how we can help CBOs.	Distribution through social media, website, articles, etc.