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

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<th>CFP professional advised</th>
<th>Other advised</th>
<th>Unadvised</th>
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<tbody>
<tr>
<td>Experience a higher quality of life</td>
<td>73</td>
<td>69</td>
<td>66</td>
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More satisfied with their financial situation:
Feel better about their spending capability, personal financial risk management, and overall wealth

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<td>More satisfied with their financial situation</td>
<td>72</td>
<td>66</td>
<td>59</td>
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Greater financial confidence:
Feel more confident about their financial security and ability to achieve their personal financial goals

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<td>Greater financial confidence</td>
<td>71</td>
<td>65</td>
<td>60</td>
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Better experience with the financial planning process:
Feel more optimistic about meeting their financial needs and achieving financial gains

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<td>Better experience with the financial planning process</td>
<td>78</td>
<td>73</td>
<td>67</td>
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Top 5 benefits of working with a financial planner reported by clients

1. Improved financial wellbeing and peace of mind
2. Better financial decision-making confidence
3. Help to explain and simplify financial matters
4. Saves time and effort organizing finances
5. Feel more satisfied with their wealth

CFP professionals unlock benefits beyond money

79% agree financial planning helps fulfill life dreams
73% feel they cope better when faced with health issues
51% say financial planning positively impacted their family life
51% report financial planning positively impacted their mental health

Clients trust financial planners to act in their best interests

95% of all financial planning clients
98% of CFP professional clients

Financial planning is a top priority for Gen Y

53% have or expect to come into an inheritance or major financial support in coming years
62% likely to start receiving this within the next 10 years, with 80% estimating this to be above US$50K
67% of unadvised Gen Y would consider paying for financial advice
34% have never engaged with a financial planner but would consider it, with 50% of those looking to start within the next 3 years, and 85% within the next 10 years