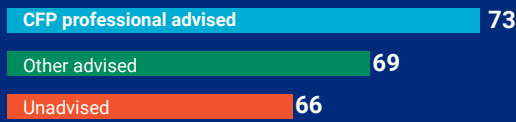


Value of Financial Planning

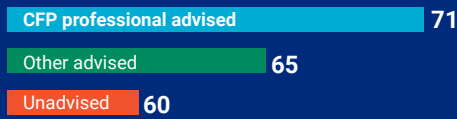
People who work with a CFP professional say they are better off

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

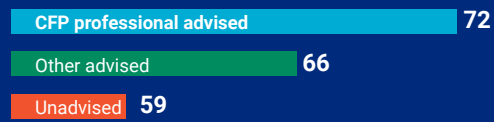
Experience a higher quality of life:
Feel better about their health, connection, purpose and life satisfaction



Greater financial confidence:
Feel more confident about their financial security and ability to achieve their personal financial goals



More satisfied with their financial situation:
Feel better about their spending capability, personal financial risk management, and overall wealth



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** 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