



# WORLD FINANCIAL PLANNING DAY

HOSTED BY FPSB

## Key messages



# World Financial Planning Day

*Live your today. Plan your tomorrow.*



- **Your future, by design.** World Financial Planning Day, hosted by FPSB and its global network, celebrates how financial planning can help people make informed financial decisions, reach their life goals and achieve greater financial confidence.
- **You don't have to do it alone.** Held on 7 October, World Financial Planning Day spotlights the power of financial planning and of working with a financial planner who has committed to rigorous standards of professionalism and to putting clients' interests first to help achieve your life goals.

**Join a global movement.** World Financial Planning Day unites the FPSB global network and more than 236,000 CFP professionals worldwide to raise awareness of the power of financial planning to help people take control of their financial well-being.

- **Take the first step.** Celebrated around the world each October, the 10<sup>th</sup> annual World Financial Planning Day is your invitation to take the next step to Live Your Today and Plan Your Tomorrow™.

Add **Call to Action:** Live your today. Plan your tomorrow. Learn more at [worldfpday.org](https://worldfpday.org)

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# Consumers

# Consumers

- Financial planning can help you create a roadmap to shape and reach the future you want — from saving and investing to buying a home, funding education, or achieving a comfortable retirement.
- Working with a CFP professional, who has committed to delivering competent, ethical, client-centered financial planning advice, can bring you confidence and peace of mind when navigating financial complexities.
- Trust matters — 98% of clients who work with a CFP professional trust their financial planner to act in the client's best interest.
- Financial planning goes beyond growing wealth - clients of financial planners reported improved financial wellbeing and peace of mind (38%) and financial decision-making confidence (37%). And over half (51%) of clients who work with a CFP professional reported that financial planning has positively impacted their mental health and family life.

## Add Call to Action:

Join us for World Financial Planning Day on 7 October to live your today, plan your tomorrow. Learn more at [worldfpday.org](https://worldfpday.org)



# Impact of AI global research findings

Coming in September: Key messages for **Consumers**

# Professionals



# Professionals

- Every day, CFP professionals help clients reduce stress, feel confident, and reach their life goals. Take part in World Financial Planning Day on 7 October to promote the wide-ranging benefits of financial planning.
- Celebrate World Financial Planning Day on 7 October to highlight our shared commitment as CFP professionals to rigorous standards in financial planning and to putting clients' interests first.
- Now more than ever, people need guidance to navigate a complex financial world — and they're looking to professionals like you. Join us for World Financial Planning Day on 7 October to help more individuals understand the value of planning and of working with a CFP professional.
- Be a champion of the profession and a partner in people's dreams. Participate in World Financial Planning Day on 7 October to help us share the value of financial planning to raise awareness, expand access, and elevate the global financial planning profession.

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