

World Financial Planning Day Marks 10 Years with Local Activities and New Research on AI in Financial Planning

Celebration will help individuals discover the value of financial planning with financial education activities and resources and artificial intelligence insights

LOCATION – DAY MONTH 2026 – As financial decisions grow more complex, **Network Organization** will celebrate the 10th annual World Financial Planning Day (WFPD) on 7 October 2026 to show how financial planning with the help of a CERTIFIED FINANCIAL PLANNER professional can help individuals and families make informed decisions, reach their goals and achieve greater financial confidence.

Hosted by the [Financial Planning Standards Board Ltd. \(FPSB\)](#) and its global network, [World Financial Planning Day](#) is held as part of the International Organization of Securities Commissions' (IOSCO) [World Investor Week \(WIW\)](#). The global campaign provides an opportunity to reinforce the value of financial planning and the role CFP professionals play in strengthening financial education and consumer protection worldwide. [View video remarks](#) from IOSCO Secretary General Rodrigo Buenaventura.



“World Financial Planning Day is a chance for people everywhere to see how financial planning can help them take meaningful steps toward the lives they want to live,” said FPSB CEO Dante De Gori, CFP. “As we mark the 10th year of this global initiative, FPSB and our Network are pleased to highlight the many ways CFP professionals can help people make informed decisions, improve their financial wellbeing and plan for the future.”

World Financial Planning Day will be marked with the release of new global findings from FPSB's *2026 Impact of Artificial Intelligence on Financial Planning* study. The research explores how artificial intelligence is shaping the way consumers engage with financial information and how financial planners are using AI to improve efficiency and better serve clients, while reinforcing the importance of professional judgment, ethical responsibility and human understanding in financial planning.

Activities in **your territory**

In **territory**, World Financial Planning Day will be celebrated through activities designed to help people better understand the benefits of financial planning, including:

-  Pro bono financial planning clinics
- In-person and virtual financial education webinars, panel discussions and videos
- Release of new findings from FPSB's *2026 Impact of AI on Financial Planning* global research
- Media and social media initiatives to raise awareness of the value of financial planning

More details of activities taking place around the world are available on the [World Financial Planning Day website](#).

New videos showcase the value of financial planning

New this year, videos featuring CFP professionals sharing how financial planning can support people and help them recognize benefits they may overlook. The videos explore two questions: [How does financial planning help people in their everyday lives?](#) and [What's one benefit of financial planning people often overlook?](#)

Get involved

Individuals are invited to take part in World Financial Planning Day activities and explore resources to understand how financial planning can help them achieve their goals. More information is available on [worldfpday.org](#) and [worldinvestorweek.org](#), and by joining the #WFPD2026 and #OSCOWIW2026 conversations on FPSB's social media channels.

Network Organization is part of the FPSB Network, which represents more than 236,000 CFP professionals worldwide. **Network Organization** is proud to work with FPSB and its global network of organizations to celebrate World Financial Planning Day to raise awareness about the importance of financial planning so individuals and families can achieve their life goals.

About **Network Organization**

Insert your organization's boilerplate

About FPSB Ltd.

FPSB manages, develops and operates certification, education and related programs to benefit the global community by establishing, upholding and promoting worldwide professional standards in financial planning. FPSB demonstrates its commitment to excellence with the marks of professional distinction – CFP, CERTIFIED FINANCIAL PLANNER and  – which it owns internationally. FPSB and our global network of organizations certify CFP professionals in 29 territories. CFP professionals are certified in Australia, Austria, Brazil, Brunei, Canada, Chinese Taipei, Colombia, France, Germany, Hong Kong, India, Indonesia, Ireland, Israel, Italy, Japan, Macau, Malaysia, the Netherlands, New Zealand, People's Republic of China, Republic

of Korea, San Marino, Singapore, South Africa, Switzerland, Thailand, the United Kingdom and the United States. There are 236,300 CFP professionals worldwide. For more, visit fpsb.org.

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About CFP Certification

CFP certification is the global symbol of excellence in financial planning and represents financial planners who commit to standards of competency and ethics, and to putting clients' interests first. The CERTIFIED FINANCIAL PLANNER credential represents financial planning professionals who commit to better serving their clients through rigorous international standards, ethical practices and lifelong learning.

CFP Certification *Global excellence in financial planning*™

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