



What is the Financial Planning Association (FPA)?

The Financial Planning Association is the membership organization for the financial planning community. FPA has been built around four Core Values: Competence, Integrity, Relationships and Stewardship. We want as members those who share our Core Values. FPA's primary aim is to be the community that fosters the value of financial planning and advances the financial planning profession. FPA's strategy to accomplish its objectives involves welcoming all those who advance the financial planning process and promoting the CFP mark as the cornerstone of the financial planning profession®.

FPA was created on the basic foundation that the CFP marks best represent the promise and the future of the financial planning profession. CFP certification offers the public a consistent and credible symbol of professional competence in financial planning. And FPA benefits the public by helping to ensure that financial planning is delivered through competent, ethical financial planners.

The Financial Planning Association of Illinois is a not for profit corporation offering a wide variety of personal finance advice from Certified Financial Planners, and other professionals. The FPA of Illinois is currently the largest of the 93 regional chapters of the national FPA with nearly 1000 members.

FPA Standard of Care

- **Put the client's best interests first.**
- **Act with due care and in utmost good faith.**
- **Do not mislead clients.**
- **Provide full and fair disclosure of all material facts.**
- **Disclose and fairly manage all material conflicts of interest.**



FPA FOR THE CONSUMER

FPA offers financial literacy services and resources through various websites and online tools. The resources on these sites are intended to help the public understand the importance of the financial planning process and the value of objective, competent, client-centered advice.

GENERAL PUBLIC

- Educate consumers about the benefits of financial planning.
- Offer guidance for different financial stages in life such as saving for college or to buy a house, getting married, starting a new career, or planning for retirement.

www.fpaforfinancialplanning.org

PLANNER SEARCH

- An online tool that connects consumers with highly qualified, ethical FPA member planners in their geographical region.
- Consumers can search the database by asset and income minimums, planner specialty, and planner compensation models

www.PlannerSearch.org

FPA PRO BONO PROGRAM

- Targets low income individuals and families striving to build assets and improve their lives but cannot afford to engage a planner on their own.
- FPA of Illinois works with community partners to provide financial planning to those in need
- Consumers can search the database by asset and income minimums, planner specialty, and planner compensation models

www.FPAProBono.org



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FPA LEGISLATIVE

FPA strives to be at the forefront of legislative issues that protect consumers and promote the highest standards of professional conduct. FPA government relations leaders and committees engage with federal and state regulators, and lawmaking bodies, to leverage a more unified voice for financial planning issues.

FINANCIAL PLANNING COALITION

The Financial Planning Coalition is a collaboration of FPA, the Certified Financial Planner Board of Standards (CFP Board) and the National Association of Personal Financial Advisors (NAPFA) to advise legislators and regulators on how to best protect consumers to ensure:

- Financial planning services are delivered with fiduciary accountability and transparency.
- Congress produces legislation that puts the interests of clients first and enables consumers to identify a trusted financial adviser.
- The public understands the benefits of financial planners and values the services provided by them; views financial planning as a legitimate and accepted profession; and demands competent and ethical professional services provided by financial planners.

www.financialplanningcoalition.com

FPA of Illinois Key Leaders

Craig Larsen, CFP® - 2015 Chairman
Linda Weinrib, CFP® - 2015 President
Jorie Pitt, CFP® - 2015 President-Elect



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CHAPTER FACTS

The Financial Planning Association of Illinois is a nonprofit organization whose members are individuals and firms promoting the financial planning process. Members of the FPA-IL include CERTIFIED FINANCIAL PLANNER™ practitioners, insurance specialists, estate planning attorneys, accountants, bankers, other financial planning professionals and firms that provide products and services through financial advisors, and students.

SOME INTERESTING FACTS ABOUT THE CHAPTER

- The FPA Illinois is the largest FPA chapter in the United States
- 75% are CERTIFIED FINANCIAL PLANNER™ (CFP®) practitioners
- 9% are Chartered Financial Consultants (ChFC)
- 12% are Chartered Life Underwriters (CLU)
- 15% are Certified Public Accountants (CPA)

WHO ARE FPA MEMBERS?

FPA's individual members include financial planners, many of whom hold the CFP® certification or are pursuing CFP® certification. Other individual members include practitioners such as accountants, attorneys, bankers, charitable giving specialists, insurance agents, stockbrokers, money managers, investment consultants, broker-dealer and corporate executives, and others who champion the financial planning process.

FPA's Broker/Dealer Division is for NASD member firms that are in the retail securities business and whose representatives are allowed to offer more than proprietary products.

FPA's Corporate Division includes corporations and other entities that provide products and services offered to or through financial advisers.

FPA National Leaders from Illinois

Marty Kurtz, CFP®, AIFA - 2011 National President
Edward W. Gjertsen II, CFP® - 2015 National President



PUBLIC AWARENESS

If your publication or broadcast covers personal finance topics, consider the membership of the Financial Planning Association of Illinois as a source for your personal finance coverage. Many FPA of Illinois members can speak on a wide variety of personal finance issues including, but certainly not limited to, saving for retirement, funding college education, creating spending plans and do's and don'ts of estate planning. We understand the nature of deadlines and can provide experts in a timely manner.

STORY IDEAS

With a membership of nearly 1,000 financial professionals, the Financial Planning Association - Illinois can help reporters formulate story ideas on a variety of timely topics. If you are interested in speaking to a member of the FPA-Illinois to help you with a story, please contact Randy Bruns at 630.719.9222, x204.

If you would like additional information about the FPA of Illinois, please contact:

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