



Celebrating 20 Years...It Matters!

Delivery of pro bono financial planning enriches the lives of everyone touched by it...the recipients, the financial planning volunteers, donors and society as a whole.

**Celebrating 20 years of pro bono financial planning and 5.7 million dollars in grant support,** the Foundation is pleased to share the FPA Annual Pro Bono Impact Report.



# Foundation for Financial Planning **FPA Annual Pro Bono Impact Report 2014**



# 5,570

## Confidential One-on-One Pro Bono Financial Planning Sessions

“I wish there were more events like this. Everything about the day was fantastic! My highest priority is planning for retirement. As a result of today, I was able to meet with a financial planner to get started.”

# 18,228 in attendance at 1,484 presentations

“Over time, through volunteering, I realized that those I assisted wanted the same thing as every other client I work with in my day job... security.”



# You made it happen, through your volunteerism!

**Volunteer Financial  
Planners:**

**2,646**

**Individuals Served:**

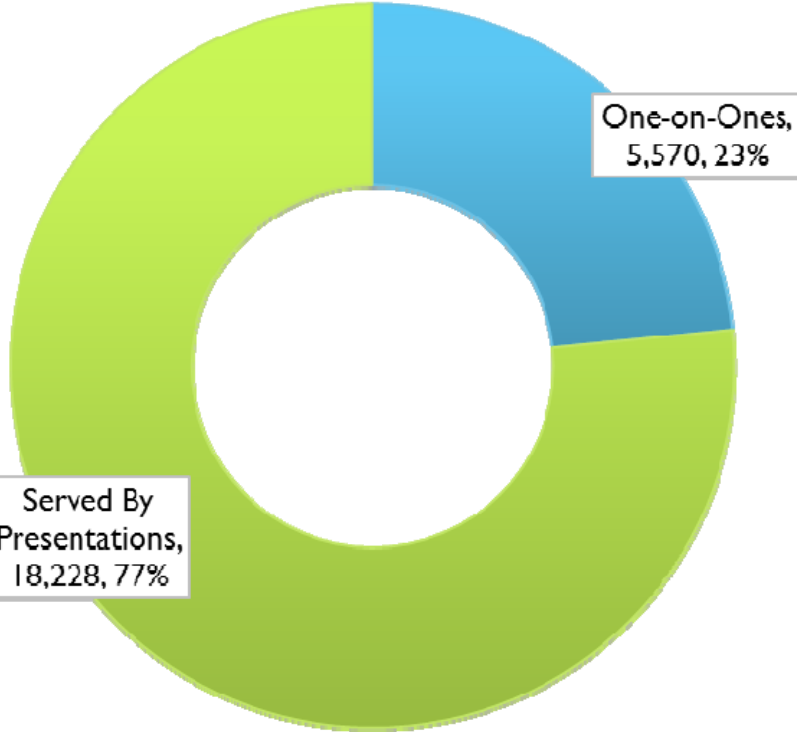
**23,798**

**Hours Volunteered:**

**18,769**

**Value of Contributed  
Hours:**

**\$3,753,125**



# National Pro Bono Partners

## Financial Planning Days Consortium



## Military Partners



## New 2014 Partner



Stakeholder  
Partnerships, Education  
and Communication  
(SPEC)

# Community Partners by FPA Chapter

## All Chapters helped with opportunities to serve these organizations

Homes for Our Troops-All Chapters available for Military one-on-ones  
Operation Home Front-All Chapters available for Military one-on-ones

## AR

### Arkansas

Our House a homeless shelter

## AZ

### Greater Phoenix

Arizona Phone Bank  
Arizona State University  
AZ Dept of Administration  
Family Self Sufficiency Alliance  
Financial Planning Day Consortium: CPF Board, US Conference of Mayors,  
FPA and FFP  
Valley of the Sun United Way

## CA

### East Bay

Financial Planning Day:  
City of Oakland Job Fair, Operation Hope, Mayors office and Local  
Assembly members  
Contra Costa County Independent Living Skills Program  
Mechanics Bank  
The High Risk Reentry Court program: U.S. District Court, the U.S.  
Attorney's Office, the Federal Public Defender's Office, the U.S.  
Probation Office, community treatment providers, and community  
support groups.

### Los Angeles

Financial Planning Day City of Los Angeles Mayor's Office  
Los Angeles Public Library  
Habitat for Humanity - Greater Los Angeles

### Northern California

America Saves Week  
Financial Planning Day; State Controller's Office for "Manage Your Money  
Week."  
Jr. Achievement-Nor Cal

## Orange County

CA State Controller's Office  
Social Security Office  
Small Business Majority  
Mercy House Transitional Living Center  
Simon Family Foundation

## San Diego

Allstate; Wise; YWCA San Diego  
Financial Planning Day Consortium-San Diego  
Miramar Marine Air Station: Corporal Course  
MoneyWise for Domestic Violence Survivors  
YWCA  
San Diego Oasis (Learning over 50); San Diego Financial Literacy Center;  
Manage Your Money Week; Financial Planning Day Consortium;  
Wounded Warriors-San Diego

## San Francisco

Casa de las Madres - domestic violence victims  
Jewish Community Center of SF  
Job Corps  
Jr Achievement- SF  
SF Mayor's Office of Financial Empowerment, Manage Your Money Week,  
Financial Planning Day Consortium  
Single Stop USA;  
CA state Controller's office  
Smart Money Network; SF Treasurer's Office of Financial Empowerment;  
Consumer Credit Counseling; Mission Economic Development Agency; SF  
Housing  
YWCA-Berkeley

## San Gabriel Valley

Pilgrim Place-Senior Retirement Community

# Community Partners by FPA Chapter

## Silicon Valley

City of Sunnyvale  
Financial Planning Day Consortium City of Sunnyvale/SV Library  
Habitat for Humanity-SV  
Various Library Locations  
Santa Clara County Library  
SCC Library System; Sunnyvale Library; San Jose Library  
University Cal Santa Clara

## CO

### Colorado

Operation Hope-Young Entrepreneurs

### Denver

Junior Achievement-Denver  
Mile Hi Church-open to entire community  
Money Smart Week-Denver

### Southern Colorado

Junior Achievement of Southern Colorado  
University of Colorado Hospital Authority

## DC

### National Capital Area

Department of Insurance, Securities and Banking for District of Columbia  
Financial Planning Day: District of Columbia, Department of Insurance, Securities, and Banking Investors Protection Trust; Bank of DC; AARP; CFP Board, US Conference of Mayors  
Greater Washington JumpStart Coalition  
Our Daily Bread  
Promote Pro bono outreach at Advocacy Day  
Virginia cooperative Extension, a partnership of Virginia Tech and Virginia State University

## FL

### Greater Ft Lauderdale

Community Foundation of Broward Co  
Community Foundation of Palm Beach

### Miami

US Southern Command

### Northeast Florida

Employee Benefit program-NE FL  
Family Foundations  
United Way Real \$ense  
United Way of Northeast Florida

### South West FL

Grace Place Naples

### Suncoast

Junior Achievement-Suncoast

## GA

### Georgia

Financial Planning Day Consortium: CFP Board, US  
Conference of Mayors, FPA and FFP; Oglethorpe University  
Money Smart Week: Local Libraries in Forsyth and Cobb Counties

## HI

### Hawaii

Wounded Warrior-Hawaii

## IA

### Iowa

United Way of Central Iowa  
United Way of Central Iowa and Iowa Legal Aid  
United Way of Central Iowa, Drake University

# Community Partners by FPA Chapter

## IL

### Illinois

Chicago Federal Reserve Money smart week  
Chicago Public Library  
Financial Planning Day Chicago Public Library  
CFP Board  
Foundation for Financial Planning  
US Conference of Mayors  
College of DuPage  
DuPage County Senior Services  
Easter Seals  
Illinois Joining Forces,  
National Guard

## IN

### Greater Indiana

Financial Planning Day Consortium, Indiana Public Retirement Systems (INPRS), Indiana Secretary of State, Consumer Protection Division, Indiana 529 Plan, VITA, Purdue Extension, Apprisen, CICOA Aging & IN Home Solution, WorkOne Indy; University of Indianapolis business students volunteer; State of Indiana Personnel Dept that Promoted FP Day

## KS

### Greater Kansas City

FDIC: Alliance for Economic Inclusion, Money Smart  
NBC Action News-Financial Planning Call in Show; Consumer Credit Counselors

## KY

### Kentuckiana

Metro Louisville Government; Operation Homefront; USAA

## LA

### Baton Rouge

Junior Achievement-Baton Rouge

### Greater New Orleans

Wise Domestic Violence prepare to launch partnership

## MA

### Massachusetts

Dana Farber Cancer Institute  
Lawrence Community Works  
Massachusetts National Guard  
Massachusetts State Treasurer's Office  
Military Student Appreciation Day University of Massachusetts Lowell  
Monson High School in conjunction with Monson Savings Bank: Financial Freedom for Veterans, Service members and their Families  
Operation Moneywise with State Treasurers office at Mass Bay Community College  
The Money Conference Financial Empowerment  
Women Veterans Conference

## MD

### Maryland

Financial Planning Day Consortium, Junior Achievement, OperationHope  
Junior Achievement-Baltimore  
Junior Achievement Finance Park  
MakingChange, Howard County Library, Money Matters Fair  
Money Power Day, Baltimore Cash Campaign

## MI

### Michigan

Money Smart Week-Michigan  
Various libraries throughout SE Michigan



# Community Partners by FPA Chapter

## MN

### Minnesota

Accountability Minnesota, Senior Linkage  
Best Prep;  
Junior Achievement  
Prepare + Prosper  
Financial Planning Day: The Foundation for Financial Planning  
The U.S. Council of Mayors  
CFP Board  
Financial Planning Association  
Minnesota Jump-Start Coalition to young independently living adults

## MO

### Greater St. Louis

Money Smart Week -St Louis; St Charles Library  
SLATE  
Financial Planning Day: FFP, CFP Board, FPA, US Conference of Mayors

### St. Louis

United Way A.S.S.E.T program  
United Way Money Smart Week  
University of MO-Columbia

## NE

### Nebraska

Best Prep & Local High schools-Omaha

## NJ

### New Jersey

Bergen Community College, Office of Event Planning  
Financial Planning Day: Department of Housing, Elizabeth, NJ  
Employee Benefit program-NJ  
Montclair Public Library

## NY

### Long Island

Employee Benefit program-LI  
IRS  
Nassau County Bar Association Pro Bono Division.

## New York

### 21 Partners

Borough of Manhattan Community College (BMCC)  
Career Gear  
Center for Independence of the Disabled (CIDNY)  
Dress for Success  
FEGS Health & Human Services  
Legal Information for Families Today (LIFT)  
nPower 3Ds for Success  
NY City Financial Action Consortium (NYCNAC)  
NY Public Library Financial Literacy Central  
NYC Office of Financial Empowerment  
Project Renewal  
Samaritan Village  
Sanctuary for Families  
Savvy Ladies  
SemiPerm  
The Family Justice Center (FJC) of NY (4 locations - Manhattan, Queens, Bronx and Brooklyn)  
W!SE (Working in Support of Education)-Domestic Violence

## Western NY

### AARP

Oracle Charter School  
Westminster Economic Development Initiative

## OH

### Central Ohio

Columbus Metropolitan Library  
Financial Planning Day Consortium-Central OH  
Junior Achievement of Central Ohio  
New Directions Career Center

# Community Partners by FPA Chapter

## Northeast Ohio

The Beacon Journal Financial literacy Article publication  
United Way, Univ of Akron, Akron Public Library, Beacon Journal  
Financial Planning Day Consortium

## South West Ohio

Financial Planning Day Consortium SW OH

## OR

### Oregon and SW Washington

Best Prep & Local High schools-Portland  
Bradley Angle , Oregon Department of Consumer & Business Services,  
Innovative Changes, Metropolitan Family Service, REACH, Rosewood  
Initiative  
Junior Achievement-Portland

## PA

### Central Pennsylvania

American Cancer Society

### Philadelphia Tri-State

Best Prep & Local High schools-Philadelphia  
Pledging Tree  
WISE; Women Against Abuse

## TN

### East Tennessee

JR Achievement of East Tennessee

### Middle Tennessee

Davidson County Correctional Facility  
Davidson County Sheriffs Department  
Edgehill Library  
Nashville Rescue Mission

## TX

### Austin

Foundation Communities financial coaching  
Vita Tax Preparation through Foundation Communities  
Women-Low income

### Dallas Fort Worth

Financial Planning Week  
Interfaith Housing coalition  
Junior Achievement DFW  
Junior Achievement-DFW  
Prisoner Entrepreneur Program  
Sigma Phi Lambda

### Houston

Financial Mentors of America (FMA)  
Methodist Hospital Clinic of Houston with the Muscular Dystrophy  
Association (MDA)  
Methodist Hospital with funding through Muscular Dystrophy Association.  
The Women's Resource of Greater Houston (TWR)

### San Antonio & South Texas

City of San Antonio and Family Service Association  
Financial Planning Day Consortium

### West Texas

Financial Planning Day, Veterans Resource Coordinating Group (VRCG)  
Veterans Resource Coordinating Group (VRCG)

## UT

### Utah

BYU University; UVU University; LDS Church;  
LDS Church and Brigham Young University  
WISE; Family Justice Center; YWCA  
YWCA; Family Justice Center

# Community Partners by FPA Chapter

## VA

### Central Virginia

Chesterfield Life Long Learning Center  
Fort Lee Military Base  
Henrico High School  
Hope Church  
Laburnum Elementary School  
Lakewood Manor  
Multiple high schools in the Richmond Metro area  
Virginia Council on Economic Education  
Wounded Warriors-Central VA

### Hampton Roads

City of Virginia Beach; Bank On  
Virginia Beach Cooperative Extension Services  
Financial Planning Day Consortium

## WA

### Puget Sound

American Financial Solutions  
Apprisen Financial Advocates  
ClearPoint Credit Counseling Solutions  
CENTS – Consumer Education and Training Services  
Financial Planning Day Consortium  
Seattle Financial Empowerment Center  
Seattle Financial Empowerment Network  
City of Seattle  
American Financial Solutions,  
CENTs,  
Clearpoint,  
Apprisen,  
Seattle Schools  
Financial Empowerment Network of Seattle-King County

## WI

### Southern Wisconsin

Canaan Baptist Church  
Employee Benefit program-SoWis.  
Journey House Center for Family Learning and Youth Athletics; The  
Wisconsin Women's Business Initiative Corporation; AARP Wisconsin  
Financial Planning Day Consortium  
Make A Difference Wisconsin

## For more information:

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Noreen Coughlin  
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## To volunteer:

- ✓ Contact your local Chapter Pro Bono or Community Outreach Director
- ✓ Sign up for pro bono financial planning on the Foundation's website
- ✓ Develop a program and/or help a non profit submit a grant:  
[www.foundation-finplan.org](http://www.foundation-finplan.org)



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# National FPA Pro Bono Advisory Committee

Dick Power, CFP®, Massachusetts, Chair  
Omega Hartman, CFP®, New Jersey, Past Chair  
Lori Irwin, CFP®, Hampton Roads VA  
Dave Hoyer, CFP®, Philadelphia Tri-State  
Wendell B. Fuller, CFP®, Central VA  
Renee Porter-Medley, CFP®, SW Florida  
Noreen Coughlin, Foundation for Financial Planning

## New Members in 2015:

Lori Ackerman, CFP®, Northern California  
Jim Thompson, CFP®, Massachusetts  
Jacqualine Arnold, Georgia

## Interested in joining the committee visit:

<http://connect.onefpa.org/volunteeropportunities>

