VOLUNTEERS NEEDED!
Financial Planning for Cancer Program

Every day families that are battling cancer make dangerous decisions like skipping a chemotherapy appointment so they can afford to feed their families. They often suffer financial distress that adversely impacts their ability to complete treatment and decreases their chance of survival.

We are currently seeking volunteers for a new program we have developed in partnership with the Financial Planning Association (FPA) and nonprofit Family Reach to provide cancer patients and their caregivers with financial planning and education to help mitigate the financial risks associated with treatment.

If you are a Certified Financial Planning professional (CFP®), then you have the opportunity to serve as a volunteer for our *Financial Planning for Cancer* program, lending your skills and knowledge to help patients manage their finances so they can focus on getting well. Please see below for a brief FAQ, and if you think you may be interested in volunteering, click here to complete our online intake form.

Once you complete the form, you will receive an email outreach from either Rachel Roth at FFP or Kurt Kaczor at FPA, who will provide you with more information about next steps and connect you with our nonprofit partner, Family Reach.

If you have any questions in the meantime, please reach out to Rachel at rroth@foundationforfinancialplanning.org or 202-864-5184.

Thank you for considering this important opportunity!

FINANCIAL PLANNING FOR CANCER PROGRAM: VOLUNTEER FAQ

What would be your role?
As a pro bono financial planner, you will advise and/or prepare a brief financial plan for each cancer patient and/or their caregiver. This process may entail:

- Creating and/or examining budget and balance sheets
- Organizing their finances, tracking and reducing expenses, and managing debts
- Troubleshooting and anticipating financial challenges
- Contemplating credit decisions and new uses of assets
- Examining life, long-term care or disability insurance questions

How would you prepare?
To prepare you to be a pro bono financial planner for cancer patients and/or their caregivers, you will be asked to complete up to two online trainings. *You will receive one hour of CFP® CE credit for completing each of these trainings (two hours of CFP® CE credit in total).*

One training will provide an overview of pro bono financial planning, including tips on how to work with lower-income individuals and families. The second training will provide an overview of the *Financial Planning for Cancer* program, information about your volunteer role, tips on how to work with clients diagnosed with cancer and their caregivers, and resources to support your engagements with clients.

What is the expected commitment of volunteers?
To be a volunteer for the *Financial Planning for Cancer* program, you will be expected to:

- Work with approximately three clients per year (you will receive client referrals from our nonprofit partner, Family Reach).
- Engage with each client up to three times, including for example, one meeting for introductions and data gathering, one meeting for planning, and one meeting for checking in with the client. Engagements can be done in-person, by phone or by Skype/FaceTime.
- Spend a total of approximately 2 to 6 hours with each client, depending on the client's needs. (Some clients may simply want advice on one or two matters and require less time.)

You can terminate your participation in the program at any time.

HOW TO DONATE

To make a donation that will help connect cancer patients and their families to free, quality financial advice, please visit **ProBono4Cancer.org**.

HOW TO VOLUNTEER

To volunteer as a pro bono financial planner, lending your skills and knowledge to helping patients manage their finances so they can focus on getting well, please visit **OneFPA.org/Cancer**.

Alexis - Mom to Jah'Cai and cancer fighter | *Photo courtesy of Family Reach*

Pro Bono Financial Planners Needed to Help Families and Individuals Living with Cancer

Every day, families battling cancer make dangerous decisions like skipping a chemotherapy appointment so they can afford to feed their families. They often suffer financial distress that adversely impacts their ability to complete treatment and decreases their chance of survival.

Cancer patients are **2.65 times** more likely to go bankrupt than people without cancer

Cancer patients who file for bankruptcy have a **80% greater** risk of dying from their disease

As a CFP® professional, you can empower these families, lending your skills and knowledge to help them manage their finances so they can focus on getting well.

The Financial Planning Association is recruiting pro bono financial planners for the Financial Planning for Cancer Program. Developed by FPA, the Foundation for Financial Planning (FFP) and Family Reach, this program provides cancer patients and caregivers with financial planning and education that will mitigate the financial risks associated with treatment. The other nonprofit partnered in this effort is Consumer Education and Training Services (CENTS).

Volunteer for the Financial Planning for Cancer Program Today!

What is the expected commitment of volunteers?

To be a volunteer for the Financial Planning for Cancer Program, you will be expected to:

- Work with approximately three clients per year. You will receive client referrals from our nonprofit partners, Family Reach and/or CENTS.
- Engage with each client up to three times, including for example, one meeting for introductions and data gathering, one meeting for planning, and one meeting for checking in with the client – unless there are special circumstances beyond your control. Engagements can be done in-person, by phone or Skype/FaceTime.
- Spend a total of approximately two to six hours with each client, depending on the client's needs. Some clients may simply want advice on one or two matters and require less time.

You can terminate your participation in the program at any time.

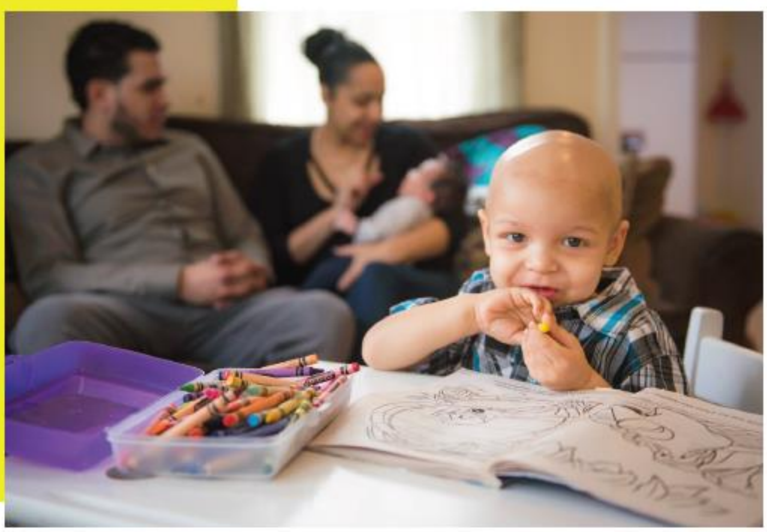
Be a Pro Bono Financial Planner & Sign Up Today!

What will you gain?

- The knowledge that you are helping ease a serious burden for families facing a cancer diagnosis
- Specialized skills by working with a specific group of clients
- Expanded professional networks with fellow planners, nonprofit organizations and hospitals that help families with cancer

Specialized Volunteer Training

To prepare you to be a pro bono financial planner for cancer patients and/or their caregivers, you will need to complete two online trainings that are CFP® CE eligible.



Brendon - 2 years old | *Photo courtesy of Family Reach*

Finances are the second biggest source of distress identified by cancer patients.

37% cut back on groceries

36% deplete their savings

24% borrow against their retirement funds

Learn More and/or Sign Up

Please visit OneFPA.org/Cancer or contact:

Kurt Kaczor, Pro Bono Director
Financial Planning Association
303.867.7180
kkaczor@OneFPA.org

Financial Planning for Cancer Partners