

CREATING  
A MORE  
**DIVERSE &  
SUSTAINABLE  
PROFESSION**



**BUILDING A  
TALENT PIPELINE**



**FOSTERING  
DIVERSITY, EQUITY  
AND INCLUSION**



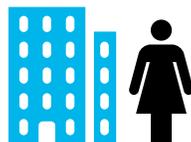
**ADVANCING  
KNOWLEDGE  
FOR PRACTICE**

**OUR IMPACT**



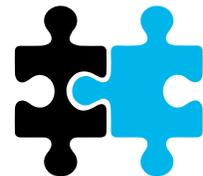
**119%**

Increase in the number  
of CFP® professionals  
under age 30 since 2016



**28%**

Proportion of new  
CFP® professionals in 2023  
who are women



**14%**

Proportion of new  
CFP® professionals in 2023 who  
are racially and ethnically diverse

# TALENT PIPELINE

**THE CENTER IS CULTIVATING A QUALITY WORKFORCE TO ENSURE THE PROFESSION CAN RECRUIT AND RETAIN THE TALENT IT NEEDS TO GROW.**



**\$2.03M+**

Awarded through 470 scholarships across 20 programs



**2,415**

Jobs and internships added to CFP Board Career Center in 2023



**\$428K**

Raised for the LeCount R. Davis, CFP® Endowed Scholarship and Women’s Initiative (WIN) Endowed Scholarship at the 2023 Imagine 50 Gala celebrating 50 years of CFP® certification



**619**

Job seekers connected with 45 employers at 2 Virtual Career Fairs in 2023



**ALYSSA CALHOUN**

Candidate for CFP® Certification, Boston University | 2023 Abacus Wealth Partners Scholarship for Increased Diversity in Financial Planning Recipient

“Obtaining CFP® certification is helping me learn the content and skills to be a trusted fiduciary for my clients. It also shows my commitment to this industry to ensure we’re setting the standard for the level of care and service clients receive when seeking a financial planner. The scholarship from Abacus Wealth has made this career switch and personal goal attainable.”



**KEVIN LIPPERMAN**

Recruiting Specialist, Ballentine Partners

“This is my second year at the [Virtual Career Fair]. And honestly, as a recruiter, it is sort of like my Super Bowl for financial planners every year. We’ve had tremendous success, not only in hiring, but with networking with other professionals.”

# DIVERSITY, EQUITY AND INCLUSION

THE CENTER IS FOSTERING A MORE DIVERSE FINANCIAL PLANNER WORKFORCE THAT REFLECTS THE CHANGING DEMOGRAPHICS IN THE UNITED STATES.



2022 Board Chair Kamila Elliott, CFP® and 2013 Board Chair and Founding Chair of WIN Nancy A. Kistner, CFP®



**273**

Attendees participated in the 6th annual Diversity Summit in 2023



**9 IN 10**

Attendees reported satisfaction with their Diversity Summit experience



**\$380K**

Raised for the Women's Initiative (WIN) Endowed Scholarship in 2023, the 10th anniversary of the WIN Council



**ANA TRUJILLO LIMÓN**

Director of Coaching and Advisor Content, Carson Group

"The Diversity Summit is among the best events and safest spaces in the industry. The lifelong connections and friendships that are made at this event are invaluable."



**LIANA BARAKAT, CPA, CFP®**

Tax Specialist, My Secure Advantage, Inc.

"This was a valuable opportunity to connect with other CFP®s and learn from one another. The speakers were very accomplished and inspiring. I look forward to attending CFP Board events in the future."

# KNOWLEDGE FOR PRACTICE

THE CENTER IS ELEVATING FINANCIAL PLANNING AS A RECOGNIZED ACADEMIC DISCIPLINE IN COLLEGES AND UNIVERSITIES.



ACADEMIC RESEARCH COLLOQUIUM

**SONYA LUTTER, PH.D., CFP®**

Professor of Practice and Director of Financial Health and Wellness at Texas Tech University delivers keynote address at ARC 2023.



## 16

Articles in 4 issues of *Financial Planning Review*, the profession's double-blind, peer-reviewed academic journal



## 227,102

Cumulative downloads of *Financial Planning Review*, including more than 30,000 in 2023



## 96

Leading academicians, researchers and practitioners convened at the 7th annual Academic Research Colloquium in 2023



## 24

Original research papers presented at the 2023 Colloquium, of which 3 received a Best Paper Award



**MEGAN MCCOY, Ph.D.**

Assistant Professor Personal Financial Planning, Kansas State University

"I loved so much about the Colloquium, from presentations on how AI is being integrated into planning to differentiating financial anxieties from financial worries. Networking opportunities connected researchers with practitioners, fueled collaborations and bridged the research-practice gap. The real game-changer was learning about CFP Board's upcoming longitudinal client study. I can't wait for updates and to see what else is on the horizon!"



**STEPHEN HORAN, Ph.D., CFA®**

Executive Editor, *Financial Planning Review*

"2023 ARC was a uniquely impactful experience. About evenly split between academics and practitioners, the delegate profile reflected the ARC mission to bring together theory and practice. Moreover, cutting-edge research addressing the impact of artificial intelligence, social media, and financial wellness uniquely advanced the profession. Another testament to the role of CFP Board in building a profession."

# MAKE AN IMPACT TODAY

The Center's work to advance the financial planning profession for the benefit of the public depends on the generous donations of corporate and individual donors. Every cent of your contribution helps to create a more diverse and sustainable financial planner workforce and a research-based, recognized body of knowledge for financial planning. Give today at [CFP.net/SupportTheCenter](https://www.cfp.net/SupportTheCenter)

## WAYS TO GIVE

The Center welcomes one-time donations, multi-year pledges, gifts of securities, planned gifts and qualified charitable distributions. You may also donate in support of one or more of the following scholarship programs:

- **LECOUNT R. DAVIS, CFP® SCHOLARSHIP:** Our first endowed scholarship, this program honors the first Black CFP® professional, LeCount Davis, by supporting Black students and professionals pursuing coursework required for CFP® certification.
- **WOMEN'S INITIATIVE ENDOWED SCHOLARSHIP:** In celebration of WIN's 10th anniversary, this newly created scholarship is designed to support the next generation of women and femme CFP® professionals. The scholarship will assist qualified women/femme students and professionals who are seeking to complete the education coursework required for attaining CFP® certification at the undergraduate or certificate level.
- **THE DEENA JO HEIDE-DIESSLIN FOUNDATION CHALLENGE MATCH SCHOLARSHIP:** Supports individuals pursuing education coursework required for CFP® certification who are from underrepresented populations and demonstrate financial need. The foundation doubles your gift dollar for dollar.
- **RICHARD B. WAGNER MEMORIAL SCHOLARSHIP FUND:** Offered in partnership with the Financial Planning Association®, this fund helps individuals from underrepresented populations complete certificate-level education coursework required for CFP® certification.

## DONOR & SPONSOR RECOGNITION

The Center provides numerous opportunities to recognize our donors and sponsors. These may include:

- Access to CFP Board Career Center job postings and a searchable database of more than 6,000 candidate profiles
- Lead sponsorship of conferences, research and thought leadership papers
- Unique networking and thought leadership opportunities with leaders from firms, university faculty, and students during annual conferences
- Logo or name included on Donor Wall at CFP Board's Washington, DC headquarters and invitation to an associated VIP event
- Logo or name on Center web pages, resources, and event signage and promotions
- Acknowledgment in Center newsletters and/or email communications with CFP® professionals, CFP Board Registered Program directors and other stakeholders
- Name listing in CFP Board Annual Report

For more information on giving options, contact Joshua Sandler, Engagement and Stewardship Manager:

[jsandler@cfpboard.org](mailto:jsandler@cfpboard.org)

202-864-5241

CFP Board recently established a new 501(c)(6) nonprofit professional organization. With this change, CFP Board consists of two affiliated organizations, one entity with 501(c)(6) tax status and another with 501(c)(3) tax status. The 501(c)(6) organization is called CFP Board of Standards. The 501(c)(3) organization is called CFP Board Center for Financial Planning. The change does not impact donations and sponsorships to CFP Board Center for Financial Planning. Donations to the Center remain fully tax deductible to the extent allowed by law.