

What services are available?

- Seminars and workshops for individuals and families:
 - ✓ basic financial literacy
 - ✓ budgeting
 - ✓ debt management
 - ✓ understanding insurance
 - ✓ building savings
 - ✓ customized programs
- Individualized one-on-one consultations

If you or someone you know could benefit from accessing the pro bono financial planning services, please contact the FPA Minnesota office at (763) 781-1212 or email volunteers@fpamn.org.

FPA Minnesota also hosts Minnesota Financial Planning Days online and in-person annually. This free event gives members of the public an opportunity to attend financial workshops and meet one-on-one with CFP® professionals to discuss personal finance questions, concerns and interests.

***Additional information can be found at:
[FPA MN Pro Bono Outreach](#)***

FPA **PRO BONO**

Contact your local FPA chapter at:

Financial Planning Association of Minnesota

(763) 781-1212
office@fpamn.org
www.fpamn.org

3900 Main Street NE
Minneapolis, MN 55421

FPA's Pro Bono Services
[Need Pro Bono Financial Planning?](#)
volunteers@fpamn.org

The Financial Planning Association® is the owner of trademark, service mark and collective membership mark rights in: FPA, FPA/Logo and FINANCIAL PLANNING ASSOCIATION. The marks may not be used without written permission from the Financial Planning Association.

CFP™, CERTIFIED FINANCIAL PLANNER™ and the federally registered CFP (with flame logo) are certification marks owned by Certified Financial Planner Board of Standards. These marks are awarded to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

PRO BONO FINANCIAL PLANNING



***Helping those in need
in times of need!***

FPA
**FINANCIAL
PLANNING
ASSOCIATION**

FPA's Pro Bono Programs

Free help ... with no strings attached

The Financial Planning Association® (FPA®) provides *pro bono* assistance to underserved individuals and families. FPA chapters and volunteers do this by



working closely with non-profit and charitable organizations to create programs that address their clients' needs. Whether providing educational seminars or individualized counseling, our volunteers can assist individuals and families who lack the income and assets needed to retain a financial planner on their own.

Unbiased financial advice with no sales or promotion of products or services

FPA volunteers abide by prescribed guidelines and follow the financial planning process. They do not sell products or services while engaged in *pro bono* activities. There is no charge, no commitment, no pressure ... just unbiased financial advice.

How can a financial planner help?

Many people think of financial planning as something for the wealthy or for active investors. In fact, it's much more than that. Financial planning involves all kinds of everyday money matters, such as drawing up a household budget to creating a debt payback plan.

“My planner’s advice was so solid. I can hardly believe the changes that have occurred. I know it isn’t going to be easy, but neither is poverty”

– Unemployed single mother
and *pro bono* client

More than that, financial planning means setting goals and determining how to reach them step by realistic step. It means turning your finances into a bridge to your future instead of a barrier.

Who do we work with?

FPA's *pro bono* program seeks to help people who need financial planning but lack the income and assets needed to engage a planner. To reach them, our chapters seek to partner with nonprofit and charitable community-based organizations serving such populations. Chapter partners include domestic violence shelters, homeless transition centers, asset building organizations, local governments and many more.

Experts you can trust

The Financial Planning Association is the membership organization for the financial planning community, with nearly 100 chapters throughout the U.S. and more than 23,000 members nationwide. FPA established its non-profit National Financial Planning Support Center in 2002 to offer *pro bono* services to victims of the September 11 attacks. Since then, *pro bono* services have grown nationally, and FPA volunteers have helped thousands of people get their financial lives in order.

“Pro Bono is a rewarding experience for both the clients and volunteers. As a volunteer I gain connections within the community. Most importantly the clients gain direction and confidence toward their financial goals.”

– Chia-Li (Jolly) Chien, CFP®, CRPC, PMP
and *pro bono* volunteer

Professionals must meet high training and experience requirements and abide by a code of ethics, further assuring their objectivity.