



Value Proposition for Firms

Financial firms better serve their clients,
enhance their talent pipeline and strengthen risk mitigation
when they recruit and develop CFP professionals.

BETTER SERVE THEIR CLIENTS: CFP professionals commit to rigorous global professional standards, ethical practices and lifelong learning. Firms report that employing CFP professionals has a positive impact on client satisfaction,¹ and nearly all clients who work with a CFP professional feel more financially secure and say they're likely to continue the relationship.²

ENHANCE THEIR TALENT PIPELINE: CFP certification is growing globally, and CFP professionals highly value their certification.³ Firms that support CFP certification report increased advisor retention rates.⁴

STRENGTHEN RISK MITIGATION: Firms report that employing a greater number of CFP professionals decreases risk.⁵

¹ 84% of firms surveyed say employing CFP professionals has a positive impact on clients' satisfaction with the firm. 2014 FPSB / Comparator Firm Research Project.

² 87% of clients of CFP professionals feel financially secure, and 92% of clients who work with a CFP professional are likely to continue the relationship with their financial planner. 2023 FPSB Value of Financial Planning Consumer Research.

³ The global number of CFP professionals has increased every year since 1996 and totaled more than 223,000 at the end of 2023. CFP professionals highly value the certification, with nearly 95% worldwide retaining the certification in 2023.

⁴ 68% of firms surveyed indicated they were better able to retain advisors if they supported advisors in attaining CFP certification. September 2012 Comparator Market Pulse.

⁵ 69% of firms surveyed indicated CFP professionals lower compliance and legal risks compared to those who are not certified. 2014 FPSB / Comparator Firm Research Project.