

# CREATING A MORE **DIVERSE & SUSTAINABLE PROFESSION**



**BUILDING A  
TALENT PIPELINE**



**FOSTERING  
DIVERSITY, EQUITY  
AND INCLUSION**



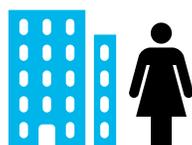
**ADVANCING  
KNOWLEDGE  
FOR PRACTICE**

## OUR IMPACT: BY THE NUMBERS



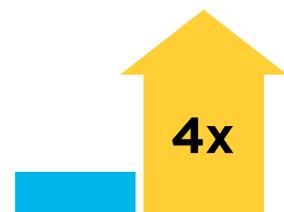
**93%**

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



**21,504**

Total women CFP® professionals, representing a 4.2% increase over 2020 numbers



**4,196**

Black and Hispanic CFP® professionals at the end of 2021, nearly 4x the growth rate of all CFP® professionals during the year

# TALENT PIPELINE

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



**\$800K+**

Awarded in scholarships to support aspiring CFP® professionals since 2016



**100%**

Increase in scholarship programs offered, for a total of 10, resulting in a record 80 new awards issued in 2021



**21K+**

Views and downloads of the 2021 *Guide to Careers in Financial Planning*, a first-of-its-kind resource for students and career changers on how to start and sustain a successful career in financial planning



**900+**

Jobs and internships added to the CFP Board Career Center in 2021



**Kathy Tague**

Senior Director, Talent Acquisition & Onboarding—Field Talent, Northwestern Mutual

“Northwestern Mutual is proud to partner with the Center for Financial Planning and work to address the current and future needs of the profession.”



**Anissa Labyad**

Student, New York University, 2020 Scholarship Recipient

“Receiving the Facet Wealth Scholarship for Increased Diversity in Financial Planning has been fundamental to my career success. With the help of Facet Wealth, I greatly look forward to becoming a CERTIFIED FINANCIAL PLANNER™ professional with a diverse perspective and a commitment to provide all families with access to high quality financial advice.”

# DIVERSITY, EQUITY & INCLUSION

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



CLOSE TO

**900**

Attendees participated  
in our fourth annual  
Diversity Summit,  
held virtually over  
2 days in 2021



**88%**

Rate of respondents  
who indicated they would  
attend Diversity Summit  
again. 68% have an  
actionable recommendation  
to implement at their  
organization



**3**

DEI Forums convened  
with leading practitioners  
who presented actionable  
recommendations to drive  
tangible and measurable  
impact across the  
profession



**294**

Job seekers  
connected with  
43 employers at the  
Diversity Career Fair  
focused on women  
and people of color



**Melanie Kahrs, CFP®**  
Wealth Manager,  
Campbell Wealth  
Management

“I applaud the CFP Board Center for Financial Planning for stepping up the focus on diversity, equity, and inclusion within an incredibly rich summit and also asking everyone to take action and bring the tactics and strategies to our firms. The complexion of our planning base when it comes to race/gender/sexual orientation already does not reflect the communities that we serve, and we need to take action as we owe it to our collective future.”



**René Nourse, CFP®**  
Founder/CEO,  
Urban Wealth  
Management

“The role and goal of the WIN Advocate program is to share the importance and the need for women to be in this industry to provide service and oversight, since women tend to be overlooked and underserved. By having women CFP® professionals share their experience, the value, and the significant impact they are providing their clients, it will help to bring more females in.”

# KNOWLEDGE FOR PRACTICE

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



127K+

Cumulative downloads of the *Financial Planning Review*, including 4 new installments published with a highly selective acceptance rate of 10% in 2021



703

Leading academicians, researchers and practitioners convened at the fifth annual Academic Research Colloquium in 2021—a 466% increase in attendance from last year's event



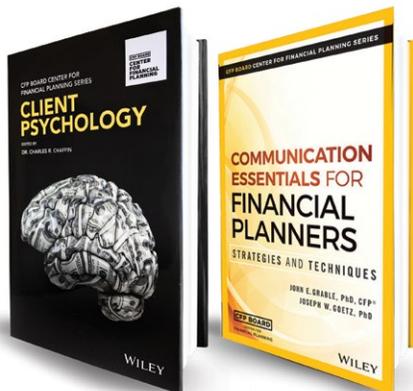
28

Original research papers were presented at the Colloquium in 2021, surpassing other academic conferences in financial planning. 7 best paper awards and 27 research posters were also presented



3

Sessions of the Client Psychology Program with The Wharton School were offered, to help financial planners develop a more client-centered practice, drawing 110 attendees



2

Volumes added to our book series, expanding the profession's body of knowledge: *Client Psychology* (2018) and *Communications Essentials for Financial Planners* (2017).



**Kimberly Beck**  
Senior Vice President,  
Marketing, Investnet

“Investnet is proud to be a Founding Sponsor of the Center for Financial Planning. We believe this partnership has played an invaluable role in diversifying and equipping the next generation of financial planners and elevating our industry to meet the growing consumer demand.”

**Make your tax-deductible gift today to help shape the future of the financial planning profession.**