

FINANCIAL PLANNING

What is Financial Planning?

Financial planners are trained to help people plan for more complex, long-term financial issues such as retirement, life insurance, estate planning, and investments.

All volunteers are Certified Financial Planner® professionals, which means they have met high training and experience requirements and abide by the CFP® code of ethics and standards of conduct. Volunteer financial planners are not allowed to sell products or take on P+P customers as clients.

There is no charge, no commitment, no pressure - just unbiased financial advice.



How can a financial planner help?

A volunteer financial planner is a financial expert who can meet with you over the phone or virtually for a one-time consultation to provide advice on any of the following topics.

- I am nearing retirement and need help figuring out distribution options.
- I need help developing a retirement savings plan.
- I want to determine appropriate insurance coverage.
- I want to talk through education funding options.
- I have inherited assets and I'm not sure how to manage them.
- I want advice on how to financially prepare for a life event.
- I want advice on how to build an emergency savings fund.
- I want to talk through options for investing.

*Volunteer financial planners are NOT able to give advice about specific investments.



How can I connect with a financial planner?

If you are ready to meet with a financial planner, scan the QR code to complete a short Financial Planner Referral form. After filling out the form, a P+P Volunteer Financial Planner will contact you within 3 weeks to schedule your consultation. This service is available February through May.

Visit <https://prepareandprosper.org/financial-resources/> or scan this QR code:



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