

Who We Are

WHY

We believe in elevating the profession that transforms lives through the power of financial planning.

We believe in changing tomorrows.

HOW

We do this by cultivating a community that provides inspiration, growth, amplification, and belonging.

WHAT

We provide support that advances financial planning practitioners throughout every phase of their career, encompassing the business, practice, and profession of financial planning.

WHO WE SERVE

Our members are financial planning practitioners who share our values, who want to master the practice of financial planning and who help shape the future of the profession.

OUR CORE VALUES

We lead with power and purpose.

We are passionate about our calling.

We strive for personal and professional excellence.

We connect for collaborative impact.

We care for and support each other.

OUR CORE POLICY

The CERTIFIED FINANCIAL PLANNER™ certification and the standards it represents constitute the foundation of the financial planning profession.