

Value of Financial Planning

People who work with a CFP^{CERT}™ professional say they are better off

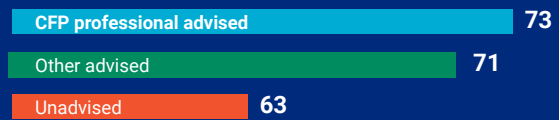
FPSB® Value of Financial Planning Index™ measures the impact of financial planning on the lives of clients, with scores ranging from 0 to 100.



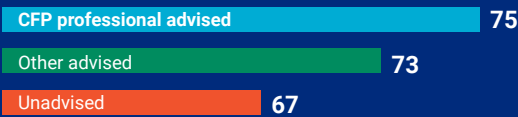
Experience a higher quality of life:
Feel better about their health, connection, purpose and life satisfaction



More satisfied with their financial situation:
Feel better about their spending capability, personal financial risk management, and overall wealth



Greater financial confidence:
Feel more confident about their financial security and ability to achieve their personal financial goals



Better experience with the financial planning process:
Feel more optimistic about meeting their financial needs and achieving financial gains



Top 5 benefits of working with a financial planner reported by clients



1 Better financial decision-making confidence



2 Improved financial wellbeing and peace of mind



3 Saves time and effort organising finances

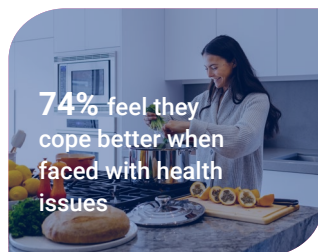


4 Improved confidence and ability to achieve desired lifestyle



5 Feel more satisfied with their wealth

CFP professionals unlock benefits beyond money

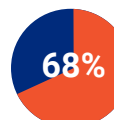


Clients trust financial planners to act in their best interests

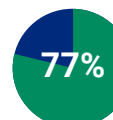
97% of all financial planning clients

97% of CFP professional clients

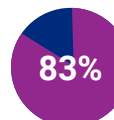
Financial planning is a top priority for Gen Y



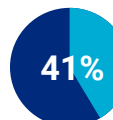
68% have or expect to come into an inheritance or major financial support in coming years



77% are likely to start receiving this within 10 years, with 71% estimating this to be above RM250K



83% of unadvised Gen Y would consider paying for financial advice



41% have never engaged with a financial planner but would consider it, with 52% of those looking to start within the next 3 years, and 90% within the next 10 years