

Value of Financial Planning

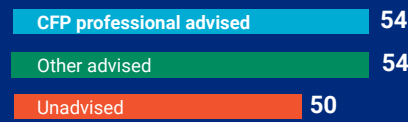
People who work with a CFP® professional say they are better off

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



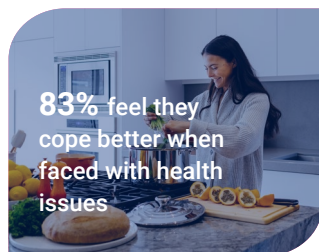
Better experience with the financial planning process:
Feel more optimistic about meeting their financial needs and achieving financial gains



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

- 1** Improved financial wellbeing and peace of mind
- 2** Better financial decision-making confidence
- 3** Help to explain and simplify financial matters
- 4** Feel more satisfied with their wealth
- 5** Improved financial freedom and control

CFP professionals unlock benefits beyond money



Clients trust financial planners to act in their best interests

94% of all financial planning clients

94% of CFP professional clients

Financial planning is a top priority for Gen Y

47% have or expect to come into an inheritance or major financial support in coming years

53% are likely to start receiving this within 10 years, with 61% estimating this to be above R1 million

77% of unadvised Gen Y would consider paying for financial advice

39% have never engaged with a financial planner but would consider it, with 62% of those looking to start within the next 3 years, and 86% within the next 10 years