

Pro Bono Efforts in the Puget Sound

How do we make the largest impact?

FPA Pro Bono's Mission Statement

We are financial planning practitioners in the Greater Seattle area that focus on providing hope and optimism to individuals, families, and our communities in need. We are committed to providing short-term financial planning assistance to those individuals that will make a lasting financial impact to their future.



Our Vision

Building a community of advisors focused on generosity

- Finding a pool of local advisors with strong presence in the community
- Getting organizational buyoff from advisory firms
 - Marketing efforts
 - Foundational to building empathy
 - Educational
- Partnering with non-profit organizations that provide financial service assistances



Our Existing Pro Bono Partnerships



FPA Pro Bono Program

Kurt Kaczor

Pro Bono Director



CENTS

Tony Leahy

Executive Director



Seattle Times – Money Makeover

Jenny Cunningham

Journalist

FPA Pro Bono

Kurt Kaczor, Pro Bono Director

FPA Pro Bono



Kurt Kaczor, Program Director

- About FPA Pro Bono: <https://www.financialplanningassociation.org/lead/pro-bono>
- Volunteer Opportunities
 - Financial Planning for Cancer
 - Homes For Our Troops (HFOT) Pro Bono Early Financial Planning Program
 - COVID-19 Pro Bono Financial Planning Program
 - FPA Chapter Pro Bono Opportunities
- Program Logistics & Next Steps
 - Contact your local FPA chapter to learn more about pro bono opportunities in your community.
 - Complete the Pro Bono Financial Planning Training.
 - Join FPA Connect "Pro Bono 360" and visit the library folders of information from FPA and its members.
 - Review FPA's Pro Bono Tools & Resources.
 - Contact FPA's pro bono director at FPAProBono@OneFPA.org with questions and to learn about national pro bono opportunities.



CENTS

Tony Leahy, Executive Director

CENTS



About CENTS

- About CENTS: <https://centsprogram.org/>
- Volunteer opportunities
- Program logistics
- Next steps



Seattle Times – Money Makeover

Jenny Cunningham, Journalist

Money Makeover

Money Makeover, a longtime feature in The Seattle Times, is a destination for readers, created in partnership with the Financial Planning Association of Puget Sound

- Publishing monthly, the Money Makeover has been a popular feature in The Seattle Times since 2007. It appears in the Sunday print newspaper and online at seattletimes.com.
- In reader surveys, it ranks among the most popular business content for print readers.
- Digitally it performs well, averaging 17,000 pageviews per profile published. For context, site average article pageviews are between 8-10,000 pageviews.
- Articles are posted to social media, Seattle Times mobile apps and newsletters.

The screenshot shows the 'Money Makeover' section of the Seattle Times website. At the top, the title 'Money Makeover' is displayed in a bold, black font. Below the title is a small RSS feed icon. The section is titled 'Latest Headlines' and features three article previews. Each preview includes a small image of the person featured in the article, the date and time of publication, the headline, and a short summary. The first article is dated April 24, 2021, at 6:31 am, and features Teri Allen. The second article is dated March 27, 2021, at 6:01 am, and features Anthony Yarnall. The third article is dated February 27, 2021, at 6:31 am, and features Lauren Benner. Each article preview is followed by the word 'BUSINESS' in a small, blue font.

Money Makeover

Latest Headlines

April 24, 2021 at 6:31 am
She's worked almost 40 years in one place. Now, can she retire before 65? | Money Makeover
At 58, with almost 40 years of steady work behind her, Teri Allen is ready to consider when she can retire, do some home remodeling...

BUSINESS

March 27, 2021 at 6:01 am
Young, determined supersaver strives to assemble a down payment | Money Makeover
Anthony Yarnall has vanquished a student debt, but he faces challenges in reaching his next financial goal: a house. He also wants to save money...

BUSINESS

February 27, 2021 at 6:31 am
Artist draws up a work-from-home strategy that will help her save | Money Makeover
Lauren Benner's career in art has been a bumpy ride, but changes prompted by the pandemic have helped her devise a plan forward.

BUSINESS

Money Makeover

While Money Makeovers outperform the average article there are a few profiles that really stand out in performance


- Relatable reader experience: retirement, student loan debt, significant life change and corresponding financial implications
- Best performer this year:
 - 76,000+ pageviews
 - 71,000+ users

Business

She's worked almost 40 years in one place. Now, can she retire before 65?

April 24, 2021 at 6:31 am | Updated May 10, 2021 at 11:11 pm

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1 of 2 | Teri Allen, of Seattle, is hoping her finances will enable her to retire when she wants to. (Dean Rutz / The Seattle Times)

By [Jenny Cunningham](#)
Special to The Seattle Times

How many jobs will you have in your life? If you are an average baby boomer, you'll work 12.3 jobs from age 18 to age 52, according to the U.S. Bureau of Labor Statistics.

Teri Allen does not fit this mold. She's a baby boomer who has worked for one employer since she was 19 years old.

Money Makeover

While Money Makeovers outperform the average article there are a few profiles that really stand out in performance

- Relatable reader experience: retirement, student loan debt, significant life change and corresponding financial implications
- Second best performer this year:
 - 25,800+ pageviews
 - 23,200+ users

Business

Old-fashioned retirement protects Seattle ironworker and his wife during market sell-off

March 21, 2020 at 6:01 am



Retired union worker David O'Meara takes in the view from his Rainier Beach porch. (Greg Gilbert / The Seattle Times)

By [Jenny Cunningham](#)

Special to The Seattle Times

Meet 69-year-old David O'Meara, a very rare retiree. While most of us are sweating bullets watching the coronavirus pandemic shrink our retirement portfolios, if any, O'Meara is cool and calm.

The Rainier Beach homeowner has pensions and an annuity. Which is to say O'Meara has something that only 17% of private-sector workers can now count on — an old-fashioned defined-benefit retirement plan

Money Makeover

Help with a variety of financial problems

- Money Makeover article page views reveals a strong interest among readers and will make a large impact to those who need this advice

TITLE	ARTICLE_PUBLISH_DAT	PAGEVIEWS	USERS
She's worked almost 40 years in one place. Now, can she retire before 65?	4/24/2021	76669	71476
Old-fashioned retirement protects Seattle ironworker and his wife during market sell-off	3/21/2020	25834	23284
Young couple's list of money goals: student debt, a house and tithing	1/30/2021	21879	19731
This Seattle couple need to dial down retirement savings to fund another goal: children	12/26/2020	21604	18574
Couple's finances are complex. And then there's the duplex ...	8/29/2020	15156	13081
Young software designer finds money brings its own concerns	1/25/2020	14882	12682
With competing demands on couple's cash, saving for retirement took a back seat	11/28/2020	11937	10130
Retirement worries and competing needs prompt family to take a hard look at spending Money Makeover	6/27/2020	11365	9589
Young, determined supersaver strives to assemble a down payment	3/27/2021	11229	9997
Their family's financial planning issues were already complex -- then came the 'coronavirus whirlwind'	4/25/2020	11001	9262
Her professional rugby career means resetting some financial goals	10/24/2020	9497	8093
Young family is down but not out after triple punch of bad luck	5/29/2020	8994	7934
With six kids, saving for the future is now	9/26/2020	7425	6274
Baby's arrival spurs young couple to get financial house in order	7/25/2020	5810	4996
Artist draws up a work-from-home strategy that will help her save	2/27/2021	3164	2727

How can we get involved?

Our Planned Structure

FPA of Puget Sound Pro Bono Committee

- FPA board member lead + three committee members with the hope of a 2-3 year commitment
 - Committee members are encouraged to move towards board membership in the future
- Must be an active CFP and FPA member
- Duties Include:
 - Managing flow of inquiries
 - Working with local non-profit partnerships
 - Quarterly meetings throughout the year for FPA
 - Commitment to 2-3 pro bono activities a year for individuals or families

Our Planned Structure

Active FPA Volunteers

- Join the FPA Pro Bono Listserv for up-to-date volunteering opportunities
 - Must be a CFP
 - 2+ years of experience as an associate or advisor
 - Complete the 1-hour online Kaplan Training Course (includes CE credit) to understand the basis of how to provide pro bono services to underserved members of your community [\[Link here\]](#)
- How to join:
 - Email info@fpapugetsound.org to be added to distribution list
- Benefits:
 - Education for associates and advisors for helping families in need
 - Serving your local community
 - Add Pro Bono Financial Planner on LinkedIn under volunteer services

Our Planned Structure

Local RIA & Brokerage Firm Members

- Work with volunteer committee members to selecting the appropriate advisor/associate to assist in the pro bono work
 - From there, you can select an appropriate associate or advisor to assist in the pro bono opportunity
- How to join:
 - Email info@fpapugetsound.org to be added to distribution list
- Benefits include:
 - Marketing/PR as a “FPA Pro Bono Advisory Firm”
 - Education for associates and advisors for families in need
 - Serving your local community

Our Planned Process

From Initial Inquiry to Assistance

1. Partnering organizations will email info@fpapugetsound.org and include pro bono committee members with volunteer opportunity
2. Committee group is managing inquiries for financial assistance and posting to listserv for distribution
 - Offers equal opportunity for pro bono work to all partnering advisory companies
 - Connects pro bono potential client to specified advisor
 - Collects and manages short-term engagement documents for compliance and tracking purposes
3. Volunteering advisor works with pro bono client for a pre-determined set of time
 - Depends on non-profit's volunteer needs

Our Call to Action

What can you do to make a difference in our community?

- Connect with your company's leadership team to join the larger commitment to pro bono reach
- Volunteer for the Pro Bono Committee – 2 to 3 year commitment
- Offer availability for pro bono assistance
 - Volunteer those services through info@fpapugetsound.org
 - Update your profile on your FPA membership profile page to show interest
 - Expect 1-3 pro bono activities throughout the year
- Spread the news within your companies and community that we are looking for both more underserved community members and volunteers

Change Tomorrows™

FPA

FINANCIAL
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ASSOCIATION

PUGET SOUND