

## FPA Pro Bono Enrollment

I, \_\_\_\_\_, agree to the following and desire to serve as a volunteer in FPA's Pro bono financial planning program to deliver free "no strings attached" financial planning information and education:

- I am an FPA member in good standing who is a financial planning practitioner
- I abide by the FPA Code of Ethics and agree to uphold FPA's Standard of Care, requiring me to place a clients' interests first.
- I have Completed FPA's Pro Bono Boot Camp training session and understand that I can take the on line exam for 1 credit CEU or view the training for no credit.
- I will complete any pro bono letter of engagement required with pro bono client or third party organization.

Please add me to the Pro Bono list of planners for the FPA.

### Sign/Insert Signature:

Date:

Name printed:

Certifications/Designations:

Organization:

preferred phone #:

Address:

City, State, Zip:

E-mail:

Type of engagement you are interested in volunteering for:

Workshop presentation Y/N:

One-on-One counseling (in-person) Y/N:

Call-in advice Y/N

Gender:

Ethnicity:

Prior Military & Branch:

Languages you speak:

Area of expertise: Budgeting, Credit, Debt Mgmt., Insurance, Investing, Savings, Retirement, Tax

Additional Comments:

Any Limitations:

\*\*email signed PDF to [fpaprobono@fpanet.org](mailto:fpaprobono@fpanet.org) questions call: 770-938-1110