

What services are available?

- Free 30 minute one-on-one consultation for individuals and families on:
 - ✓ basic financial planning
 - ✓ planning for college and retirement
 - ✓ smarter investing
 - ✓ understanding insurance
 - ✓ building savings
 - ✓ coping with job loss and life crisis
- Free toolkit of personal financial resource materials following the consultation for additional support
- Online resources at:
www.fpaforfinancialplanning.org

"FPA members have been searching for ways to reach out to those who normally could not afford the services of a Certified Financial Planner. We are excited about offering pro bono financial advice to the general public. In this economy, financial planning is more important than ever."

*– Christopher M. Lee, CFP®,
Director of FPA CT Pro Bono
Network, CT Valley Chapter*



**Contact the FPA CT
Pro Bono Network today:**

860-721-PLAN (7526)

or

Toll free at 800-490-4237

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FPA's *pro bono* programs are funded in part by generous grants from the Foundation for Financial Planning.



FPA CT PRO BONO NETWORK



Founding Partner:

Office of the CT State Treasurer



With generous funding from:



FPA CT Pro Bono Network

Free help ...no strings attached

The FPA CT Pro Bono Network of Financial Planners provides *pro bono* assistance to individuals and families to help them plan for a secure financial future. The network of planners is supported by the Financial Planning Association chapters of CT (CT Valley, New Haven and Fairfield). Our volunteers assist individuals and families with limited resources to help with their most pressing financial issues. FPA CT Pro Bono Network volunteers abide by prescribed guidelines and follow the financial planning process. They do not sell products or services while engaged in *pro bono* activities. There is no charge, no commitment, no pressure ... just unbiased financial advice.

What can the FPA CT Pro Bono Network help me with?

Basic financial planning, building savings, choosing the right insurance, retirement planning, coping with job loss or life crisis, planning for college and retirement, smarter investing, getting married and starting a family.

Additional support is also available through FPA online resources at www.fpaforfinancialplanning.org. A free customized financial toolkit to all participants is available following the consultation.

What is Financial Planning?

Financial planning is the long term process of wisely managing your finances so you can achieve your goals and dreams while at the same time negotiating the financial barriers that arise at every life stage.

How can a financial planner help you?

Many people think of financial planning as something for the wealthy or for active investors. In fact, it's much more than that. Financial planning involves all kinds of everyday money matters, such as how to juggle saving for retirement and college while paying off a mortgage or car loan.

The FPA CT Pro Bono Network assists low and moderate income individuals who meet the FPA CT Pro Bono Network income limits*. A volunteer will evaluate your specific financial concern and assist you in identifying solutions.

* Certain Housing and Urban Development (HUD) income restrictions for CT apply. For a one person household the income must not be greater than \$43,050, 2 person \$49,200, and 3 person limit is \$55,350.

Experts you can trust

The Financial Planning Association (FPA) is the nationwide membership organization for the financial planning community, with some 100 chapters and more than 28,000 members nationwide. FPA established its non-profit National Financial Planning Support Center in 2002 to offer *pro bono* services to victims of the September 11 attacks. Since then, *pro bono* services have grown nationally, and FPA volunteers have helped thousands of people get their financial lives in order.

The FPA CT Pro Bono Network consists of FPA volunteers who are CERTIFIED FINANCIAL PLANNER™ professionals. CFP® professionals must meet high training and experience requirements and abide by a code of ethics, further assuring their objectivity.

How do I get started?

Individuals using the FPA CT Pro Bono Network can meet with a planner by calling 860-721-PLAN(7526) or toll free at 800-490-4237.

Over 50 members from CT Chapters of the Financial Planning Association are participating in the FPA CT Pro Bono Network.