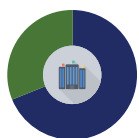


WHY FIRMS VALUE

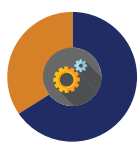


PROFESSIONALS

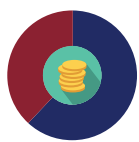
CFP PROFESSIONALS ARE MORE PRODUCTIVE AND PROFITABLE



69% of firms said CFP professionals have a higher rate of **GROWTH OF ASSETS UNDER MANAGEMENT**



66% of firms said that CFP professionals are **MORE PRODUCTIVE**



62% of firms said that CFP professionals **GENERATE HIGHER PROFIT**

CFP PROFESSIONALS LOWER CORPORATE RISKS AND COMPLAINTS

LOWER COMPLIANCE AND LEGAL RISKS

69% indicate CFP professionals lower compliance and legal risks



FEWER CLIENT COMPLAINTS

59% report fewer client complaints against CFP professionals



CFP PROFESSIONALS = SATISFIED CLIENTS



DIFFERENTIATE THE BUSINESS

81% of firms say CFP professionals help differentiate their business



INCREASE CLIENT RETENTION

76% of firms indicate employing CFP professionals leads to increased client retention



BOOST CLIENT SATISFACTION

84% of firms say employing CFP professionals has a positive impact on client satisfaction

Firms expect an increase in the number of people seeking advice from financial planners.



CFP PROFESSIONALS MAKE GREAT EMPLOYEES

- 60% average longer employment
- 76% experience higher rates of career advancement



79% OF FIRMS PLAN TO GROW
THE NUMBER OF CFP PROFESSIONALS

FPSB Ltd. conducted global research, using Comparator Benchmarking, with:

- 92 FIRMS
- 12 TERRITORIES
- 120,117 FINANCIAL ADVISERS
- 11,568 CFP PROFESSIONALS