



Measuring the chapter's **impact** in the community over the past year.

The Financial Planning Association of Silicon Valley is committed to serving the needs of our professional membership community and the community-at-large in the spirit of a shared Primary Aim: *To elevate the profession that transforms lives through the power of financial planning.* The members who comprise our chapter are passionate about the financial planning profession and all it can do as we look to transform the lives of those in our community—and each of us personally.

For the Primary Aim to have impact, it must be more than words on paper. It needs to be institutionalized in everything we do as a chapter and as a contributor to the Silicon Valley area. That is why the chapter engages in critical programs throughout the course of the year where we can directly impact the lives of those in our community through educational programs and pro bono financial planning, and through our efforts to engage likeminded organizations and state policymakers who have an impact on our profession and the consumers of financial services.

**The 2019 Community Impact Report of the FPA of Silicon Valley** provides a glimpse into those programs that are ‘moving the needle’ for our members, our profession, and for those who put their trust into the sage guidance only competent, ethical financial planning professionals can provide.

## Pro Bono Financial Planning - *Helping the Underserved*

EVENT / DATE	PURPOSE OF EVENT	# OF VOLUNTEERS	# OF VOLUNTEER HOURS	# OF INDIVIDUALS REACHED
October 14, 2018: Financial Planning Day – Sunnyvale Library	Help members of the community by providing complimentary one-on-one financial planning advice.	10	35	26
November 3, 2018: Financial Planning Day – San Mateo Library	Help members of the community by providing complimentary one-on-one financial planning advice.	10	45	55
November 17, 2018: Financial Planning Day – Redwood City Library	Help members of the community by providing complimentary one-on-one financial planning advice.	10	35	25
December 31, 2018: Financial Education to Victims of Domestic Violence (in partnership with WomenSV)	Provide financial education to victims of domestic violence to assist them as they rebuild their lives. Worked with WomenSV and presented to two groups of 30 women. Also provided pro bono financial education to eight women.	2	8	68
May 18, 2019: Financial Planning Day – Santa Clara Library	Help members of the community by providing complimentary one-on-one financial planning advice.	12	35	30

### Measuring Our Pro Bono Impact



**44**  
volunteers

**158**  
hours  
volunteered

**204**  
individuals  
helped

## State Advocacy Day - *Engaging Our Elected Leaders*

ISSUE	ACTION TAKEN	RESULTS	STATUS
March 4, 2019: Sacramento Day on the Hill	<p>Collaboration with other FPA chapters in California to further forge critical relationships with lawmakers.</p> <p>Members of the chapter met with several State Senators and Assemblymembers to push back on potential legislation that would require a tax on financial planning services.</p>	<p>Willingness of more representatives to meet with FPA of California and FPA of Silicon Valley representatives to seek our opinion on legislative matters that impact the profession and consumers of financial services.</p> <p>Spoke to our support of the fiduciary standard and opposition to a sales tax on financial planning fees.</p>	The FPA of Silicon Valley—as part of the FPA of California—has forged an exceptional relationship with the California Department of Insurance and California Department of Business Oversight. They call upon the chapter with questions and issues where our input is needed.

## Community Outreach - *Educating the Public*

EVENT / DATE	PURPOSE OF EVENT	# OF VOLUNTEERS	# OF VOLUNTEER HOURS	# OF CONSUMERS REACHED
July 1, 2018 through June 30, 2019: High School Financial Education Program	The initial goal was to provide information to teachers to teach basic finance to the students as part of a Living Skills class, but with instructor turnover, it was easier for the chapter to provide volunteers to teach the financial literacy portion of the class at Gunn High School in Palo Alto.	12	24	440
July 1, 2018 through June 30, 2019: Financial Education Library Seminars	Help members of the community better understand basic financial concepts so they can make better financial decisions.	14	18	175

### Measuring Our Community Impact



**26**  
volunteers

**42**  
hours  
volunteered

**615**  
consumers  
educated

## Community Relationships Forged - *Working with Likeminded Organizations*

ORGANIZATION	PURPOSE	SUCCESSES TO DATE	FUTURE GOALS
June 20, 2019: Triple Treat Networking Event with CalCPA and the Asian Pacific American Bar Association (APABA)	To connect professionals from the financial planning, accounting and legal communities in the Silicon Valley area with the goal of identifying ways to collaborate with and support each other.	The event was nearly sold-out (70 attendees) with three organizations marketing to their respective membership bases. We are exploring a similar event for 2020 in the South Bay.	The 6 <sup>th</sup> Annual Triple Treat event is already booked with CalCPA and APABA for June 25, 2020. Since this location is in the north-end of our geographic area, we are planning a similar event in the South Bay (more central zone of our geographic area) in 2020.

## Supporting the Next Generation of Financial Planners - *Building Our Profession's Future*

EVENT	DATE	PARTICIPANTS
NexGen Social Gathering	September 27, 2018	11
Student Forum with UCSC Silicon Valley Extension: A Day in the Life of a Financial Planner	October 3, 2018	32
NexGen Education Event: Building Your Own Practice	November 29, 2018	8
NexGen Education Event: Estate Planning	January 31, 2019	9
Student Forum with UCSC Silicon Valley Extension: Surviving an Audit of Your Practice (California)	February 13, 2019	37
NexGen Social Gathering	March 28, 2019	12
Student Forum with UCSC Silicon Valley Extension: Retirement Tools and Processes—Guiding Clients Through the Retirement Planning Process	May 17, 2019	25
NexGen Education Event: Virtual vs. In-Person Relationships	May 30, 2019	11



## **What We Have Heard...About Pro Bono Financial Planning**

Over the past year, we had the opportunity to engage many in our community to help them with no-strings-attached, one-on-one pro bono financial planning consultation. Feedback has been positive and fuels us to continue with our efforts in the years ahead. Here is a sampling of what we have heard:

- “Opportunity to rethink my financial plan for my current phase in life.”
- “Stress free, accessible & easy to ask questions.”
- “Provided new perspective on financial planning, budgeting.”
- “Personal approach.”
- “It's something everyone can learn from.”
- “Free and made us feel more confident about our money.”
- “I felt heard. The financial planner event is helpful.”
- “Non-biased help, assistance, knowledge.”
- “Helpful advice without a sales pitch.”
- “I took away so much useful, actionable information. Thank you for putting together this event!”
- “I really got a lot out of this meeting.”

## **What We Have Heard...About the Education Program at Gunn High School**

Through our chapter's work to help educate students at Gunn High School through the Living Skills curriculum, we have had the opportunity to help our community's young people get a head start on their financial management. Here is what we have heard:

- “He tried to get everyone involved with the conversation.”
- “I like how he reminded us of credit scores and student loans for college.”
- “I learned a lot and really enjoyed the enthusiasm.”
- “Was clearly passionate and asked us what we wanted to know about.”
- “It was very useful and I felt I was actually learning very applicable stuff.”
- “Everything was explained well and easy to grasp.”
- “We discussed things that aren't usually discussed at school.”
- “The presenter told us how we can start financial planning even as teenagers.”
- “Taught me how to manage my money for the better in the future.”

## **What We Have Planned for the Next Year**

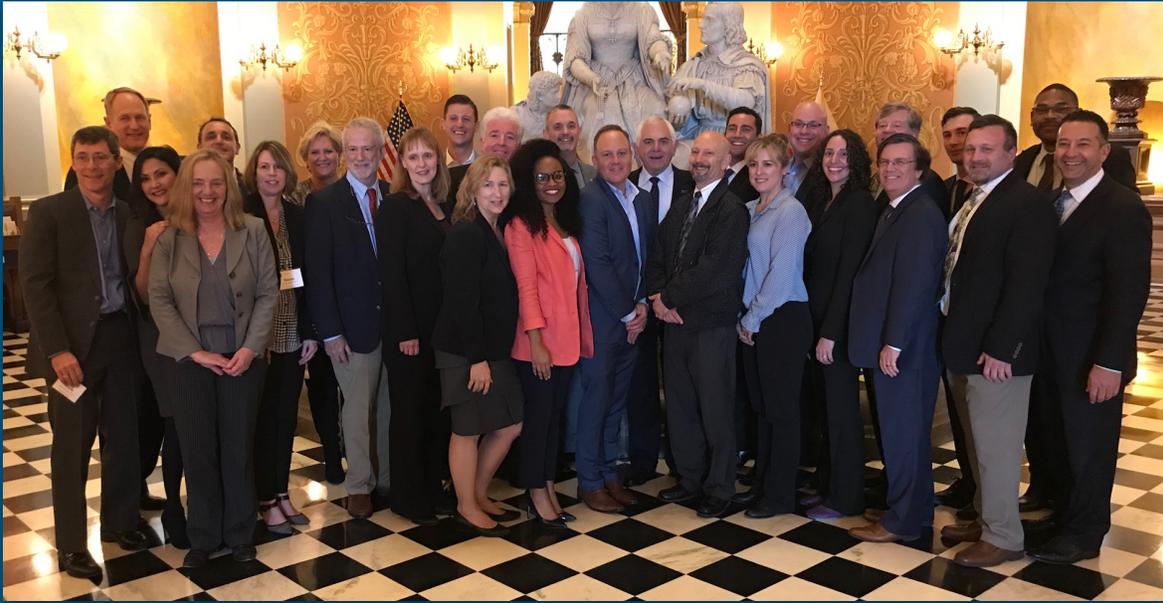
The FPA of Silicon Valley is already working to plan out a robust schedule of programs that will positively impact those professionals in our chapter and those in our community.

- Financial Planning Days to deliver pro bono financial planning to members of the community
- Financial Education Library Seminars to help educate members of the community
- Financial coaching for victims of domestic violence
- Continued financial education teaching in the Life Skills Program at Gunn High School
- Advocacy Day on the Hill in Sacramento
- FPA of Silicon Valley Symposium (February 13, 2020)
- Nine chapter meetings (second Friday of each month—except February, June, August)
- NexGen social and education events
- Student Forum events (February and June 2020)
- Four educational webinars
- Two ‘Triple Treat’ Networking Events (June 25, 2020 in San Mateo / second event TBA)

*Note: Dates are TBA if not noted.*

“[The volunteers] come into our classes to present material in an organized way, and also to answer burning questions that the kids have. It’s been great and they find it informative.”

Jeannette Tucker  
Teacher at Gunn High School



For more information about the 2019 Community Impact Report for the FPA of Silicon Valley, or to learn how you can work with the chapter to support those in the community through pro bono financial planning and education, please contact the following representatives:

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