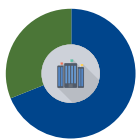


WHY FIRMS VALUE

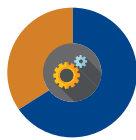


PROFESSIONALS

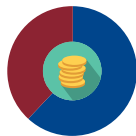
CFP^{CM} PROFESSIONALS ARE **MORE PRODUCTIVE AND PROFITABLE**



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., the owner of CFP marks in 26 countries/regions except the U.S., has conducted a global research using Comparator Benchmarking with:

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

The Institute of Financial Planners of Hong Kong (IFPHK) is a member organization of Financial Planning Standards Board Ltd. (FPSB Ltd.).



INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG

www.ifphk.org

CFP^{CM}, CERTIFIED FINANCIAL PLANNER^{CM},  CFPTM,  CERTIFIED FINANCIAL PLANNERTM, AFPTM, ASSOCIATE FINANCIAL PLANNERTM,  AFP[®] and  ASSOCIATE FINANCIAL PLANNER[®] are certification marks and / or trademarks owned outside the U.S. by Financial Planning Standards Board Ltd. The Institute of Financial Planners of Hong Kong is the marks licensing authority for the CFP marks and AFP marks in Hong Kong and Macau, through agreement with FPSB.

