

# Value of Financial Planning

People who work with a financial planner say they are better off

FPSB® Value of Financial Planning Index™ measures the impact of financial planning on the lives of clients, with scores ranging from 0 to 100.



**Experience a higher quality of life:**  
Feel better about their health, connection, purpose and life satisfaction



**More satisfied with their financial situation:**  
Feel better about their spending capability, personal financial risk management, and overall wealth



**Greater financial confidence:**  
Feel more confident about their financial security and ability to achieve their personal financial goals



**Better experience with the financial planning process:**  
Feel more optimistic about meeting their financial needs and achieving financial gains



## Top 5 benefits of working with a financial planner reported by clients



Better financial decision-making confidence



Feel more satisfied with their wealth



Researching and providing financial recommendations

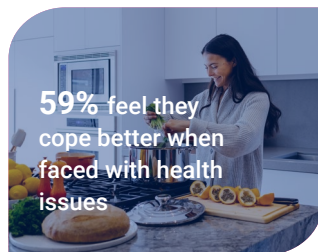


Improved confidence and ability to achieve desired lifestyle



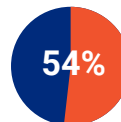
Improved financial freedom and control

## Financial planners unlock benefits beyond money

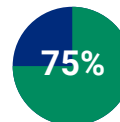


**93%** of clients trust financial planners to act in their best interests

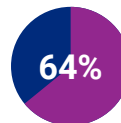
## Financial planning is a top priority for Gen Y



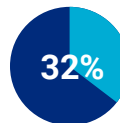
have or expect to come into an inheritance or major financial support in coming years



likely to start receiving this within the next 10 years, with 91% estimating this to be above HK\$400K



of unadvised Gen Y would consider paying for financial advice



have never engaged with a financial planner but would consider it, with 38% of those looking to start within the next 3 years, and 85% within the next 10 years