



## **FPA Pro Bono Eligibility Policy**

To ensure consistency of representation, information and procedures for pro bono financial planning efforts, FPA's policy on pro bono volunteer eligibility is as follows:

To serve as an FPA pro bono volunteer providing financial planning education to the public, individuals must:

- Be a FPA member in good standing, and
- Complete FPA's Pro Bono Boot Camp training session, and
- Sign the pro bono letter of engagement that states he/she will take responsibility for services provided in the engagement, and
- Be a CFP® Professional in good standing with CFP Board, or
- Be a non CFP® Professional who agrees to abide by FPA's Code of Ethics and Standard of Care and who works in conjunction with a CFP® practitioner.

*November 20, 2015*