



COLLEGE FOR
FINANCIAL PLANNING®
A KAPLAN COMPANY

2026 Survey of Trends

in the Financial Planning Industry



The financial planning profession is currently navigating one of the most complex periods in its history. The industry is simultaneously managing a demographic “changing of the guard,” where the retirement of a significant number of advisors is giving rise to a new generation of planners who require new skills and face different client expectations; a technological revolution driven by artificial intelligence (AI); and clients whose top concerns have increased in scale and whose interests have expanded into financial literacy and multi-generational wealth planning. Yet, despite these shifts, the data from our latest Survey of Trends reveals a workforce that is not only enduring; it’s flourishing.

For this year’s report, the College for Financial Planning®—a Kaplan Company surveyed 1,099 financial professionals representing a diverse cross-section of the industry. The findings paint a picture of a profession at a strategic inflection point, tasked with simultaneously harmonizing the human element of advice with the disruption of AI, bridging the demographic gap to secure the next generation of talent, and delivering specialized education and training in an increasingly complex market.

This study details the friction points and bright spots of today’s landscape, offering actionable insights for individual financial advisors to thrive in their profession, and for financial education decision-makers to build a resilient, future-ready workforce. The Survey of Trends serves as a comprehensive guide, providing the data-driven clarity needed to navigate an evolving profession.

Survey Objectives

Our survey provides a view into today’s financial practitioners based on the experiences of past students of the College for Financial Planning, including professional designation holders and CERTIFIED FINANCIAL PLANNER™ professionals. This includes:

Financial Practitioner Profile

- Demographics
- Reasons for pursuing a financial services career
- Financial credentials earned
- Impact of financial credentials on careers
- Financial professional practice

About Their Clients

- Typical client
- Client concerns
- Meeting needs and interests

Financial Practitioner Viewpoints

- Success factors
- Financial education and training
- Education/training impact and effectiveness
- Financial planner workforce challenges
- Biggest industry challenges for the future

Throughout the 25-plus years we have been publishing the Survey of Trends, one trend has remained an absolute constant: the tangible return on investment of professional education. Our historical data consistently links financial designations to higher earning potential and robust client acquisition, and this year’s results are no exception. For firms and advisors seeking to measure their competitive edge, these findings provide a critical benchmark for success.

About the Survey Respondents

Here is the demographic profile of the financial professionals who participated in our survey and insights into why they chose their profession.

Demographics

More than half of respondents were between 35 and 54 years of age, with **78%** holding a bachelor's degree or advanced degree and nearly **80%** of respondents having a professional focus in financial planning:

Gender	Age	Race and Ethnicity	Education
56% of respondents are female, 43% are male, and 1% preferred not to share their gender.	A variety of age groups responded, with 30% being 34 or younger, 51% being between the ages of 35 and 54, and 18% being at least 55 years old. 1% preferred not to provide their age.	82% of respondents characterized themselves as white, 7% as Asian, and 3% as Black or African American. Respondents were able to select multiple races. 8% of respondents reported that they are of Hispanic or Latino ethnicity.	52% of surveyed financial services professionals hold a bachelor's degree with another 24% holding a master's degree. 2% hold another higher education degree. The remainder either hold less than a bachelor's degree or preferred not to answer.



Professional Focus

Of the financial services professionals surveyed, **79%** report that their current professional focus is financial planning. Other top areas they are involved in include investment planning (**38%**), securities (**22%**), and insurance (**14%**). Respondents were able to select multiple industries that best reflected their employment.

Reasons for Pursuing a Financial Services Career

Why choose a career in financial services? Respondents had a wide range of reasons. Based on their responses, six distinct segments emerged:

The Helper

32% motivated by a desire to serve others, provide financial security, educate the community, and/or make a positive difference in clients' lives

The Intellectual

25% driven by an academic passion for markets, economics, mathematics, and/or their specific educational degree, and a love for analysis

The Networker

18% entered the field through direct personal connections, taking over the family business, parental influence, or being recruited by friends or mentors

The Pivoter

15% whose entry into the financial services field was often unplanned or pragmatic, resulting from serendipitous job openings, layoffs, or general career transitions

The Entrepreneur

6% attracted by the earning potential, entrepreneurial autonomy, flexible work/life balance, or career stability

The Self-Improver

4% inspired by a personal desire to gain financial literacy, manage their own wealth effectively, or correct past negative experiences with financial advice



“Financials are so important in planning for your future and retirement, and being able to learn and also guide clients and helping them reach their goals has always been something I wanted to do. And now I get to do it!”

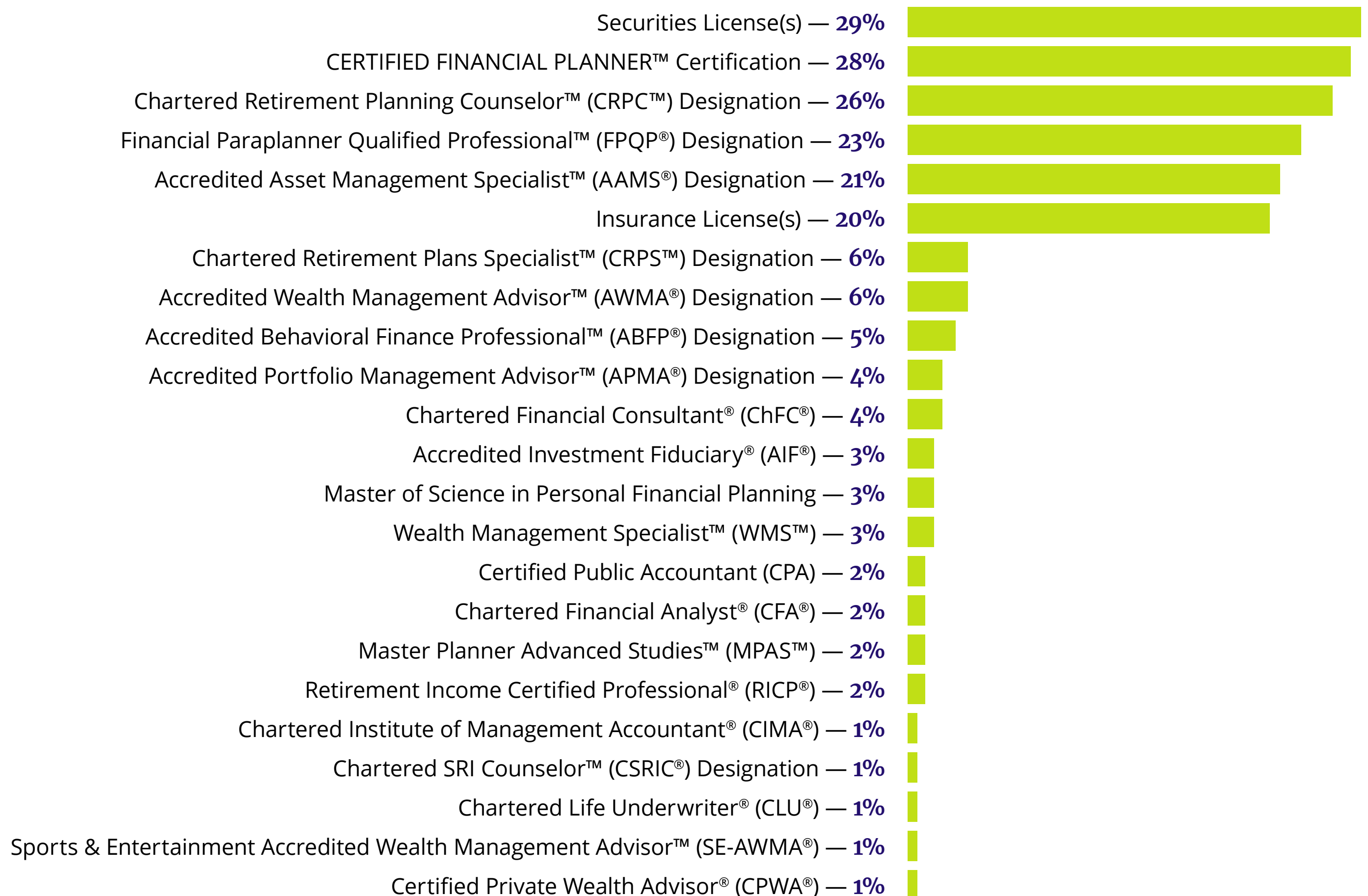
—Survey Respondent

Financial Credentials Earned

We asked participants about the financial credentials they earned and uncovered the effect their credentials have had on their careers, including whether the credential(s) helped them gain greater confidence talking to clients, acquire more clients, and influence increased earning potential and career satisfaction.

The Professional Credentials Breakdown

75% of financial professionals surveyed hold a professional designation, license, certification, or financial graduate degree. Among these survey participants, the following are the credentials respondents hold, along with the percentage of holders:



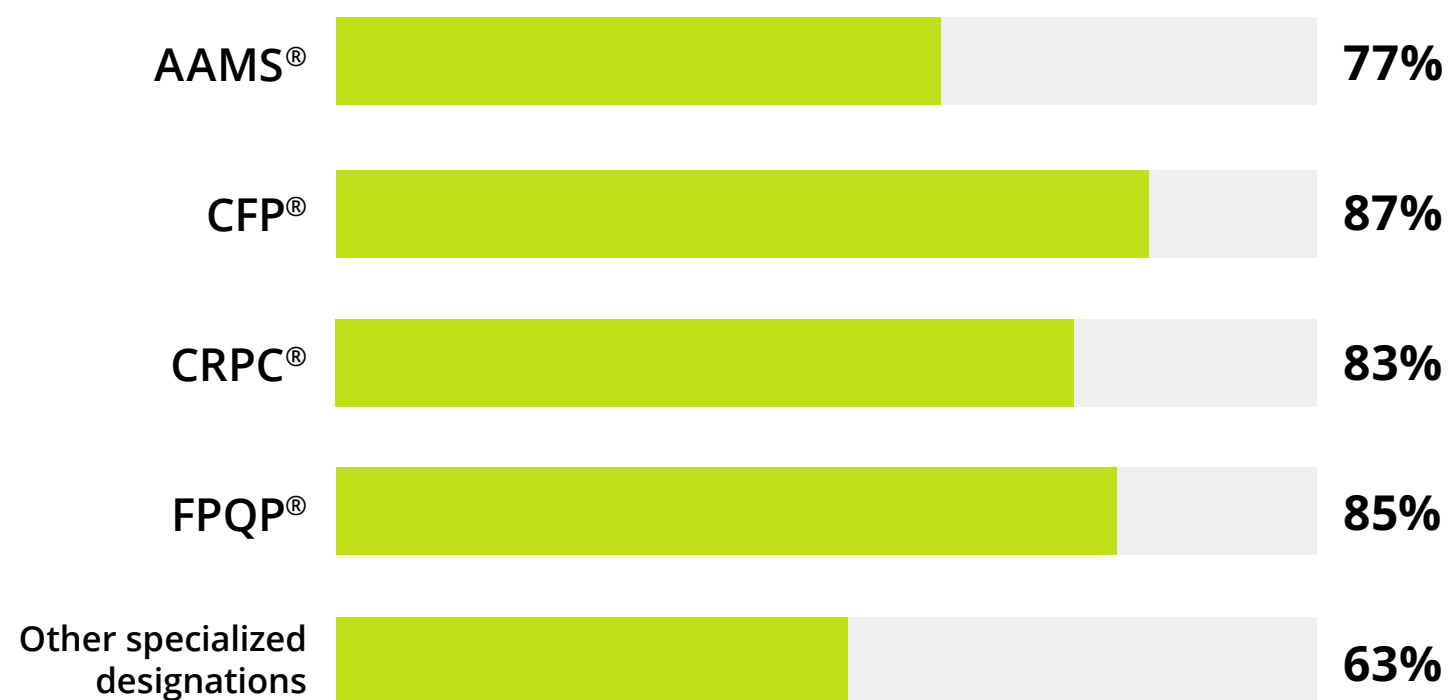
Impact of Financial Credentials on Careers

Among those who hold a professional license or credential, we asked the effect their credentials have had on career satisfaction. For those surveyed professionals who are working in financial planning roles, we also asked about the impact their credentials have had on confidence in talking to clients, client growth, and earning potential.

Career Satisfaction

Since earning their most recent financial credential, **77%** of College for Financial Planning graduates surveyed report being more satisfied with their career. The chart provides a breakdown of increased career satisfaction based on designation.

Career Satisfaction Gains by Credential



Confidence in Speaking with Clients

86% of College for Financial Planning graduates surveyed report becoming more confident in speaking with clients after earning their most recent financial license or credential. In the chart is the percentage of participants who report gaining confidence in speaking with clients, by designation held.



Client Base

81% of College for Financial Planning graduates surveyed reported that they saw an increase in their client base after earning their most recent financial credential.* Results by designation are as follows:

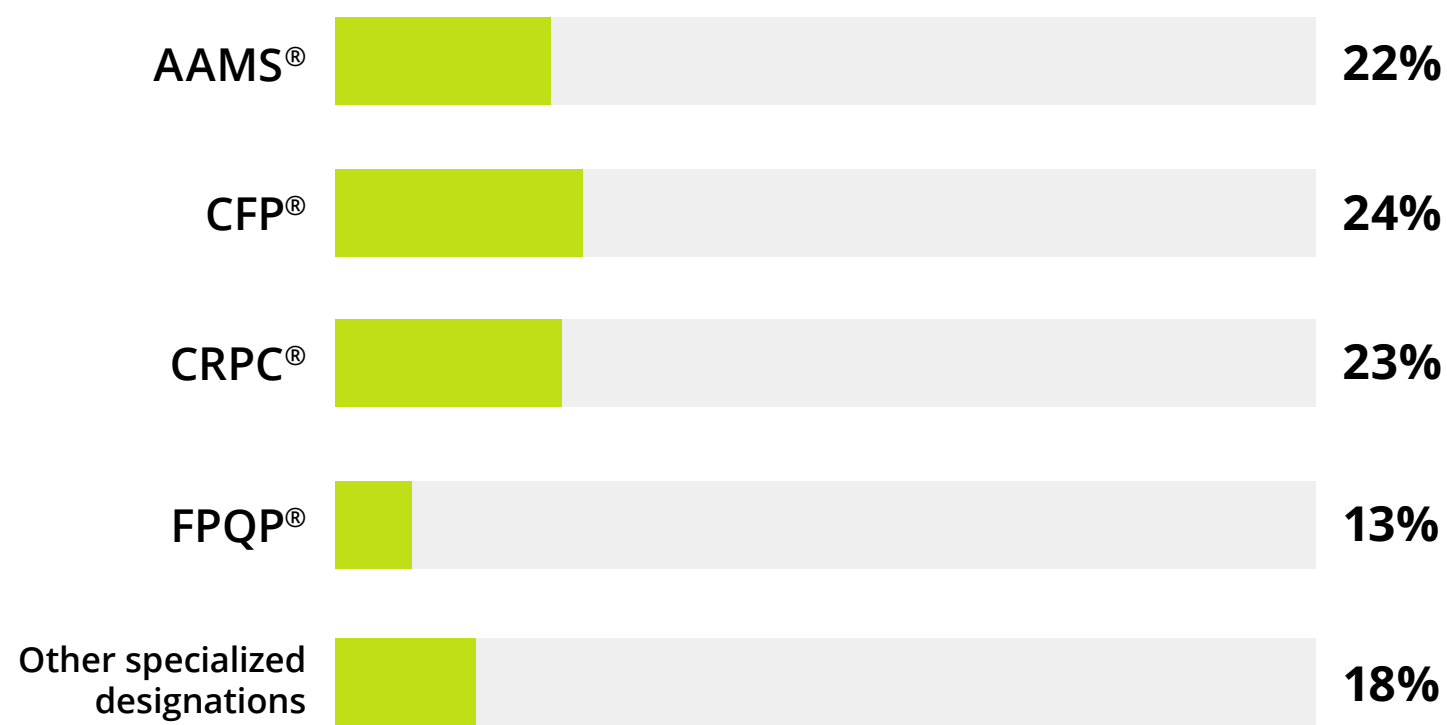


*Increase in client base is dependent on numerous factors other than, or in addition to, completion of the specialized financial designation, including specific employment conditions and individual experience. The College for Financial Planning®—a Kaplan Company does not guarantee any increase in clients resulting directly from such designation. Results are the findings of a quantitative survey conducted by the College for Financial Planning® between October 10 and November 7, 2025. For this survey, a sample of 1,099 College for Financial Planning past students was interviewed online in English. The sample includes 546 respondents who earned a professional designation, license, or certification; worked in a financial planning role both the year before and the year after receiving their last professional designation, license, or certification; and answered this question.

Earning Potential

College for Financial Planning graduates surveyed, who were employed in financial planning positions both the year before and year after receiving their latest financial designation, reported an average **21%** increase in earnings after earning their credential.[†] Earnings increase by designation is as follows:

Earnings Gains by Credential



[†]Earnings increases are dependent on numerous factors other than, or in addition to, completion of the specialized financial designation, including specific employment conditions and individual experience. The College for Financial Planning®—a Kaplan Company does not guarantee any earnings increase resulting directly from such designation. Results are the findings of a quantitative survey conducted by the College for Financial Planning® between October 10 and November 7, 2025. For this survey, a sample of 1,099 College for Financial Planning past students was interviewed online in English. This earnings increase was based on 587 respondents who were employed in a financial planning role both the year before and the year after receiving their most recent professional designation.



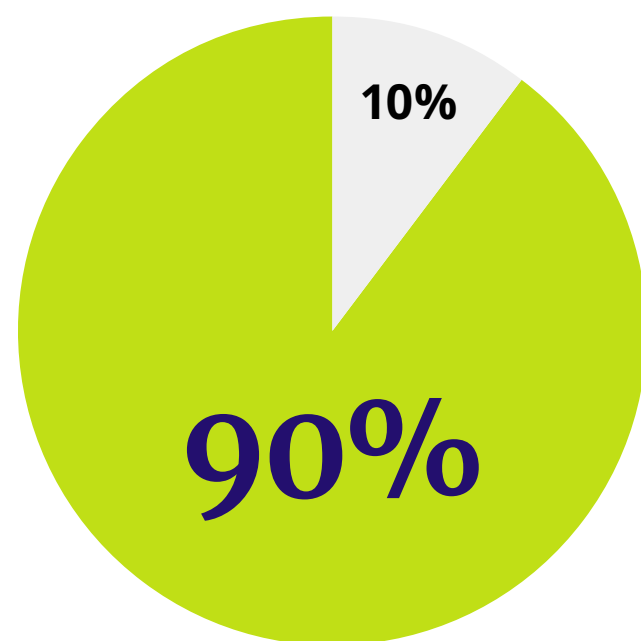
Summary: Their Financial Professional Practice

As part of our survey, we investigated financial professionals' work environment, including whether or not they serve in a leadership capacity.

Work Environment

The majority of surveyed professionals stated that they were employed by a financial services firm, with only **10%** identifying as self-employed.

Employment Type



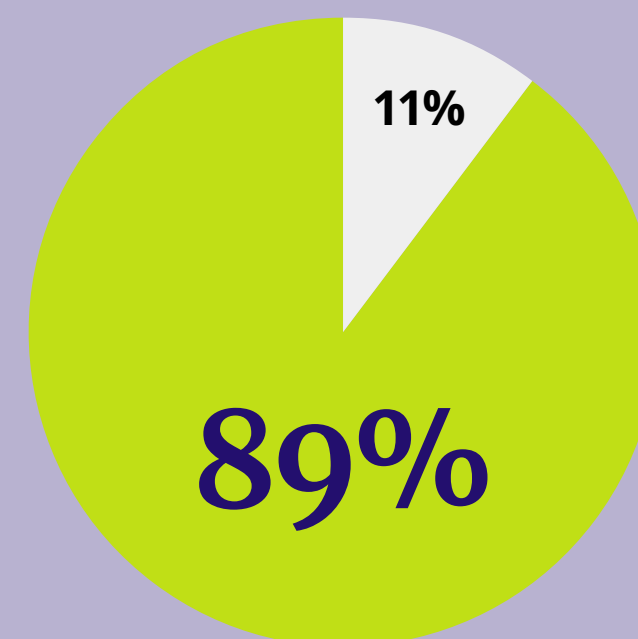
● Employed by a financial services firm ● Self-employed

Number of Financial Advisors Employed by a Firm



Managerial Responsibilities

11% report supervising, managing, or leading other financial advisors. Those working at smaller firms were more likely to hold supervisory positions than those at larger firms.



● Do not have managerial responsibilities ● Have managerial responsibilities

About Their Clients

The financial planners we surveyed have 110 clients on average, with **20%** having more than 250 clients. They report having worked an average of 7 years with their clients, broken down as follows: **50%** have worked with their clients for 4 years or less, **26%** for 5 to 9 years, and **24%** for 10 years or more.

We asked our survey participants to tell us about their typical clients and client interests.

Typical Client

73% of financial planners surveyed reported that their typical client is a salaried professional, compared to **18%** who stated that they were business owners, and **9%** stating that they were a mix of these two types of clients as well as others (e.g., retirees). Respondents report that their typical clients have the following characteristics:

55

Average Age

89% of financial planner clients are between the ages of 40 and 69, with an average age of 55.



Income

91% of financial planners report that their clients have incomes of more than \$100K, with **28%** reporting incomes of \$250K-plus.



Net Worth

51% of financial planners surveyed state that their typical client has a net worth of \$1 million or more; **17%** report a net income of \$2 million or more.

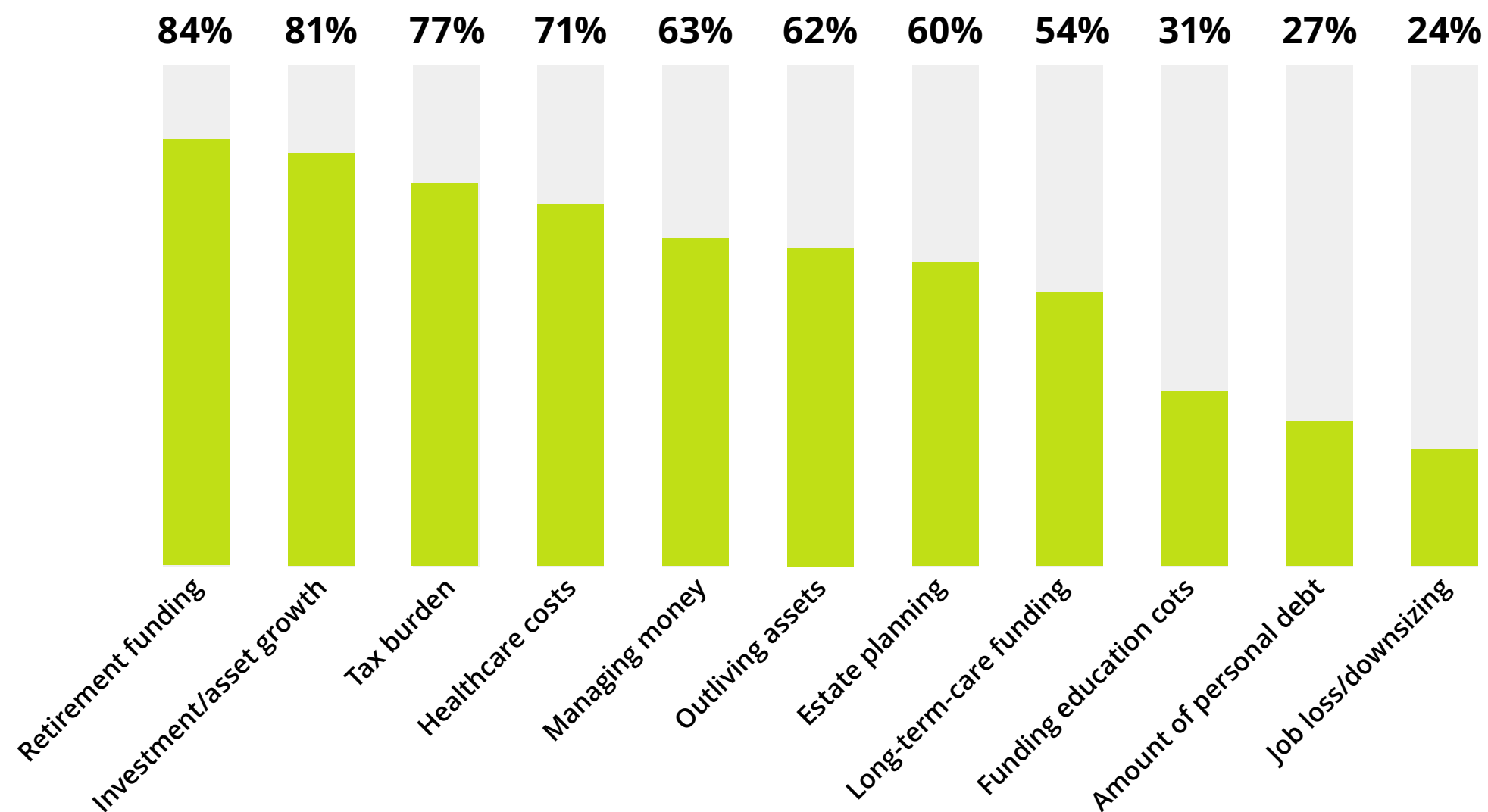
“[I have the] opportunity to build relationships and provide individuals with unique ideas to help grow their wealth and reach their goals.”

—Survey Respondent

Client Concerns

The greatest concerns that financial planning clients have center around retirement funding, investment/asset growth, and their tax burden, with healthcare costs falling quickly behind. Since our last study, retirement funding has overtaken investment growth as clients' top concern. Concerns over tax burden (**77%**) and healthcare costs (**71%**) have become a greater source of worry for clients (compared to **73%** and **67%**, respectively, in our 2024 study). Managing money, outliving assets, estate planning, and long-term-care funding continue to be secondary concerns.

Concerns from the Average Client



Meeting Needs and Interests

Financial professionals recognize the need to adapt their expertise and services, pointing to skills like multi-generational wealth planning and enhanced client education.

Multi-Generational Wealth Planning

To effectively meet the holistic and intergenerational needs of their clients, **61%** of respondents believe that a financial certification in generational wealth management is critical to helping them serve their clients' needs and grow their client base.

Financial Literacy

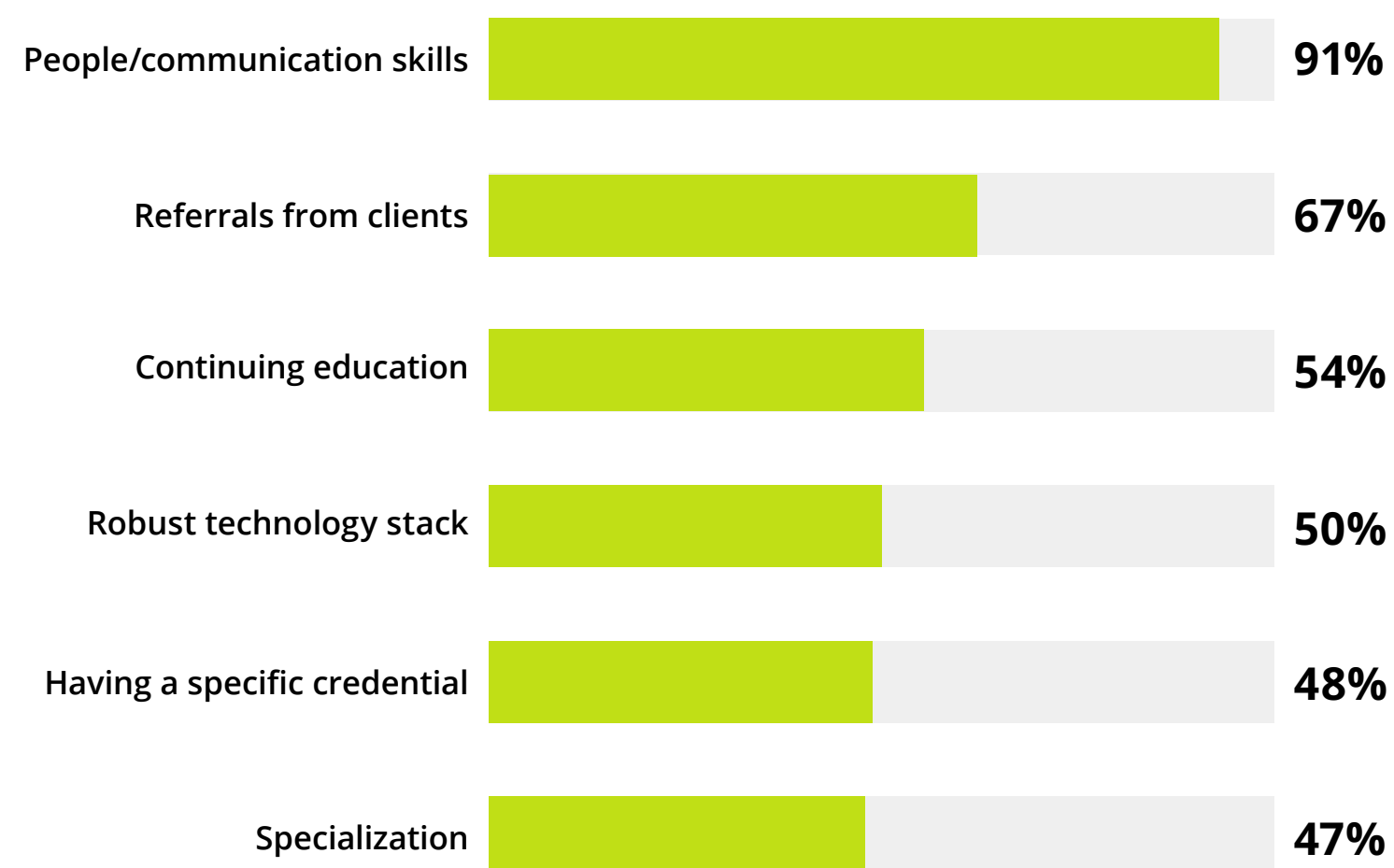
Nearly two-thirds of respondents have also seen an increased interest in financial literacy programs focused on earlier education with regard to managing personal finances.

Financial Practitioner Viewpoints

The Survey of Trends also gives us insight into the perspectives of financial professionals related to the industry. In particular, respondents provided us with an understanding of perceived success drivers, thoughts on financial education and training, and the role they have on helping address workforce challenges.

Success Factors

The biggest factor surveyed financial practitioners cited as impacting their success was people/communication skills. Developing strong relationships built on trust is essential to a financial professional's work. Secondly, two-thirds of respondents cited referrals from clients as affecting their success, with surveyed professionals relying on their clients to help them build their business.



“[I’m driven by] wanting to help people meet their financial goals. Explaining things to people that are complex, in a simplified and digestible manner.”

—Survey Respondent



Financial Education and Training Programs

Training is paramount to career development for financial planners. As they are developing their careers in financial planning, respondents identify three areas of importance.



Financial planners are looking for both hard and soft skills training. In particular:

- **8 out of 10** financial planners see fiduciary training as essential for minimizing compliance, litigation, and reputational risks across a financial professional's entire client base, even when no formal fiduciary duty is required.
- Similarly, **8 out of 10** view mastering behavioral science, including the role of psychological biases and emotions, as critical to service clients and grow their practice.

Education/Training Impact and Effectiveness

- **84%** of respondents report that their company offers financial education and training programs. Three quarters of those report being satisfied with these programs.
- **70%** believe the programs have provided them with deeper technical knowledge.
- **50%** feel that these programs have been beneficial with regard to soft skills development.

Financial Planning Workforce Challenges

Financial planners are faced with myriad workforce challenges. Helping employees feel career satisfaction is the greatest challenge that surveyed professionals identified; however, **60%** of respondents also cited challenges related to recruiting or engaging employees.

Biggest Workforce Challenges



Financial education and training programs are seen as being valuable in addressing these financial planning workforce challenges. **60%** believe their company's financial education and training programs are critical to helping employees feel career satisfaction, and more than half see them as critical to engaging employees.

Training is especially imperative for recent graduates. Only **42%** of respondents agreed that recent graduates have the skills needed to succeed in the financial services industry.

“[Firms need to provide] enough opportunities and time so employees can take advantage of these training programs. [They] need to also update current programs with newer changes in the industry so folks are not left behind.”

—Survey Respondent



Biggest Industry Challenges for the Future

We asked our survey participants what they viewed as the biggest challenges facing the financial services industry in the next 5 years. Three main themes emerged:

39%

Artificial Intelligence (AI)

39% of respondents felt that technology and AI disruption was the biggest challenge facing the industry. Financial professionals surveyed mentioned the rapid integration of AI into their workplace and the continued growth of robo-advisors as a threat to the human element of advice, creating pressure to adapt or risk obsolescence.

61%

Despite AI's transformative effects across many industries, respondents to our survey are not yet overwhelmingly embracing AI. Only about half of those surveyed agree that advisor AI tools are essential to a financial professional's success. **61%** of professionals that supervise, manage, or lead other financial advisors agree that it is essential to have AI tools for their team to succeed.

26%

Talent and Succession Planning

26% mentioned the talent and succession crisis on the horizon, caused by aging advisors retiring without enough younger, qualified talent entering the pipeline.

23%

Regulatory and Political Uncertainty

23% cited increasing compliance burdens, shifting government regulations, and political instability as driving up costs and operational complexity.

In addition to these primary themes, survey participants also mentioned fears related to market volatility and economic instability, as well as challenges combating misinformation and restoring public trust in the industry.

“I think it is the battle to be personable and have the human connection that our clients need—with good communication, connection, and trust—where AI will be our competitor for the analysis and overall financial planning. We as financial professionals have only one ingredient that AI cannot match and we have to not only excel at it, but also have the knowledge to compete against AI or we will be in less demand.”

—Survey Respondent

Conclusion

As the financial services landscape shifts under the weight of artificial intelligence and demographic change, the 2026 Survey of Trends offers a clear verdict: The future belongs to the prepared. Today's practitioners will need to adapt to the changing environment, but maintain the empathy, judgement, and trust that define a successful advisory relationship.

The results of this survey demonstrate that continuous education is the bridge between these two worlds. It is the catalyst that transforms a transactional service into a holistic partnership, giving advisors the confidence to navigate complexity and the soft skills to connect deeply with clients. At the College for Financial Planning, we are dedicated to providing the specialized knowledge financial professionals need to remain indispensable, whether as a new entrant finding one's footing or a veteran leader shaping the next generation.

Methodology

The College for Financial Planning®—a Kaplan Company developed an online survey to inquire about financial practitioner demographics, experience, and industry perspectives. The survey was distributed to former students of the College for Financial Planning® between October 10 and November 7, 2025. A total of 1,099 respondents completed the survey, although not all of them answered every question.

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Appendix

2026 Survey of Trends Data

Findings

Unless otherwise noted, data are among the findings of a quantitative survey conducted by the College for Financial Planning®—a Kaplan Company between October 10 and November 7, 2025. For this survey, a sample of 1,099 College for Financial Planning® past students was interviewed online in English.

Career Satisfaction

Total Respondents

77% of financial professionals surveyed are more satisfied with their financial planning career after earning their most recent financial credential through the College for Financial Planning.

The sample includes 819 respondents who earned a professional designation, license, or certification and who answered this question.

Total Specialized Designations

78% of professionals surveyed with specialized financial designations are more satisfied with their financial planning career after earning their most recent financial credential through the College for Financial Planning.

The sample includes 502 respondents whose most recent professional designation earned was a specialized financial designation (AAMS®, ABFP®, ADPA®, APMA®, AWMA®, CRPC™, CRPS™, CSRIC®, FPQP®, SE-AWMA®, WMS™) and who answered this question.

CFP®

87% of CFP® professionals surveyed are more satisfied with their financial planning career after earning their CFP® mark.

The sample includes 157 respondents whose most recent professional designation earned was the CFP® mark and who answered this question.

AAMS®

77% of AAMS® professionals surveyed are more satisfied with their financial planning career after earning their AAMS® designation.

The sample includes 106 respondents whose most recent professional designation earned was the AAMS® designation and who answered this question.

CRPC®

83% of CRPC® professionals surveyed are more satisfied with their financial planning career after earning their CRPC™ designation.

The sample includes 111 respondents whose most recent professional designation earned was the CRPC™ designation and who answered this question.

FPQP®

85% of FPQP® professionals surveyed are more satisfied with their financial planning career after earning their FPQP® designation.

The sample includes 167 respondents whose most recent professional designation earned was the FPQP® designation and who answered this question.

All Other Specialized Designations

63% of professionals surveyed with specialized financial designations are more satisfied with their financial planning career after earning their most recent financial credential through the College for Financial Planning.

The sample includes 118 respondents whose most recent professional designation earned was a specialized financial designation (ABFP®, ADPA®, APMA®, AWMA®, CRPS™, CSRIC®, SE-AWMA®, WMS™) and who answered this question.

Confidence

Total Respondents

86% of financial planning professionals surveyed are more confident in speaking with clients after earning their most recent financial credential through the College for Financial Planning.

The sample includes 621 respondents who earned a professional designation, license, or certification; are working in a financial planning role; and answered this question.

Total Specialized Designations

87% of financial planning professionals surveyed with specialized financial designations are more confident in speaking with clients after earning their most recent financial credential through the College for Financial Planning.

The sample includes 355 respondents whose most recent professional designation earned was a specialized financial designation (AAMS®, ABFP®, ADPA®, APMA®, AWMA®, CRPC™, CRPS™, CSRIC®, FPQP®, SE-AWMA®, WMS™); are working in a financial planning role; and answered this question.

CFP®

93% of CFP® professionals surveyed are more confident in speaking with clients after earning their CFP® mark.

The sample includes 147 respondents whose most recent professional designation earned was the CFP® mark; are working in a financial planning role; and answered this question.

AAMS®

85% of AAMS® professionals surveyed are more confident in speaking with clients after earning their AAMS® designation.

The sample includes 92 respondents whose most recent professional designation earned was the AAMS® designation; are working in a financial planning role; and answered this question.

CRPC®

89% of CRPC® professionals surveyed are more confident in speaking with clients after earning their CRPC™ designation.

The sample includes 91 respondents whose most recent professional designation earned was the CRPC™ designation; are working in a financial planning role; and answered this question.

FPQP®

96% of FPQP® professionals surveyed are more confident in speaking with clients after earning their FPQP® designation.

The sample includes 84 respondents whose most recent professional designation earned was the FPQP® designation; are working in a financial planning role; and answered this question.

All Other Specialized Designations

78% of financial planning professionals surveyed with specialized financial designations are more confident in speaking with clients after earning their most recent financial credential through the College for Financial Planning.

The sample includes 88 respondents whose most recent professional designation earned was a specialized financial designation (ABFP®, ADPA®, APMA®, AWMA®, CRPS™, CSRIC®, SE-AWMA®, WMS™); are working in a financial planning role; and answered this question.

Increase in Clients

Increase in client base is dependent on numerous factors other than, or in addition to, completion of the specialized financial designation, including specific employment conditions and individual experience. The College for Financial Planning®—a Kaplan Company does not guarantee any increase in clients resulting directly from such designation.

Total Respondents

81% of financial planning professionals surveyed reported an increase in their client base after earning their most recent financial credential through the College for Financial Planning.

The sample includes 546 respondents who earned a professional designation, license, or certification; worked in a financial planning role both the year before and the year after receiving their last professional designation, license, or certification; and answered this question.

Total Specialized Designations

79% of financial planning professionals surveyed with specialized financial designations reported an increase in their client base after earning their most recent professional designation through the College for Financial Planning.

The sample includes 311 respondents whose most recent professional designation earned was a specialized financial designation (AAMS®, ABFP®, ADPA®, APMA®, AWMA®, CRPC™, CRPS™, CSRIC®, FPQP®, SE-AWMA®, WMS™); worked in a financial planning role both the year before and the year after receiving their most recent professional designation; and answered this question.

CFP®

88% of CFP® professionals surveyed reported an increase in their client base after earning their CFP® mark.

The sample includes 134 respondents whose most recent professional designation earned was the CFP® mark; worked in a financial planning role both the year before and the year after receiving their most recent professional designation; and answered this question.

AAMS®

86% of AAMS® professionals surveyed reported an increase in their client base after earning their AAMS® designation.

The sample includes 79 respondents whose most recent professional designation earned was the AAMS® designation; worked in a financial planning role both the year before and the year after receiving their most recent professional designation; and answered this question.

CRPC®

86% of CRPC® professionals surveyed reported an increase in their client base after earning their CRPC™ designation.

The sample includes 79 respondents whose most recent professional designation earned was the CRPC™ designation; worked in a financial planning role both the year before and the year after receiving their most recent professional designation; and answered this question.

FPQP®

64% of FPQP® professionals surveyed reported an increase in their client base after earning their FPQP® designation.

The sample includes 73 respondents whose most recent professional designation earned was the FPQP® designation; worked in a financial planning role both the year before and the year after receiving their most recent professional designation; and answered this question.

All Other Specialized Designations

81% of financial planning professionals surveyed with specialized financial designations reported an increase in their client base after earning their specialized designation through the College for Financial Planning.

The sample includes 80 respondents whose most recent professional designation earned was a specialized financial designation (ABFP®, ADPA®, APMA®, AWMA®, CRPS™, CSRIC®, FPQP®, SE-AWMA®, WMS™); worked in a financial planning role both the year before and the year after receiving their most recent professional designation; and answered this question.

Increase in Earnings

Earnings increases are dependent on numerous factors other than, or in addition to, completion of the specialized financial designation, including specific employment conditions and individual experience. The College for Financial Planning®—a Kaplan Company does not guarantee any earnings increase resulting directly from such designation.

Total Respondents Working in a Financial Planning Role

Professionals working in a financial planning role both before and after receiving their most recent financial credential reported an average 21% earnings increase in the year after earning that credential through the College for Financial Planning.

This earnings increase was based on 587 respondents who were employed in a financial planning role both the year before and the year after receiving their most recent professional designation.

Total Specialized Designations Working in a Financial Planning Role

Professionals working in a financial planning role both before and after receiving their most recent specialized professional designation reported an average 20% earnings increase in the year after earning that professional designation through the College for Financial Planning.

This earnings increase was based on 286 respondents with a specialized financial designation (AAMS®, ABFP®, ADPA®, APMA®, AWMA®, CRPC™, CRPS™, CSRIC®, FPQP®, SE-AWMA®, WMS™) who were employed in a financial planning role both the year before and the year after receiving their most recent professional designation.

CFP® Professionals Working in a Financial Planning Role

CFP® professionals surveyed working in a financial planning role both before and after receiving their CFP® mark reported an average 24% earnings increase in the year after earning that certification.

This earnings increase was based on 123 respondents whose most recent certification was the CFP® mark and who were employed in a financial planning role both the year before and the year after receiving the CFP® mark.

AAMS® Working in a Financial Planning Role

AAMS® professionals surveyed working in a financial planning role both before and after receiving their AAMS® designation reported an average 22% earnings increase in the year after earning that certification.

This earnings increase was based on 75 respondents whose most recent certification was the AAMS® designation and who were employed in a financial planning role both the year before and the year after receiving the AAMS® designation.

CRPC® Working in a Financial Planning Role

CRPC® professionals surveyed working in a financial planning role both the year before and the year after earning their CRPC™ designation reported an average 23% earnings increase in the year after earning that designation.

This earnings increase was based on 69 respondents whose most recent designation was the CRPC™ designation and who were employed in a financial planning role both the year before and the year after receiving the CRPC™ designation.

FPQP® Working in a Financial Planning Role

FPQP® professionals surveyed working in a financial planning role both before and after receiving their FPQP® designation reported an average 13% earnings increase in the year after earning that certification.

This earnings increase was based on 70 respondents whose most recent certification was the FPQP® designation and who were employed in a financial planning role both the year before and the year after receiving the FPQP® designation.

All Other Specialized Designations Working in a Financial Planning Role

Professionals working in a financial planning role both the year before and the year after earning their most recent specialized professional designation reported an average 18% earnings increase in the year after earning that specialized professional designation through the College for Financial Planning.

This earnings increase was based on 72 respondents whose most recent designation earned was AAMS®, ABFP®, ADPA®, APMA®, AWMA®, CRPS™, CSRIC®, FPQP®, SE-AWMA®, or WMS™; and who were employed in a financial planning role both the year before and the year after receiving their most recent professional designation.

Generational Wealth

61% of financial professionals surveyed agree that a financial certification in generational wealth transfer is critical to help serve clients' needs and grow their client base.

The sample includes 751 respondents who answered this question.

AI Tools

55% of financial professionals surveyed agree that advisor AI tools are essential to a financial professional's success.

The sample includes 751 respondents who answered this question.

61% of financial professionals surveyed who supervise, manage, or lead other financial advisors agree that it is essential to have advisor AI tools for their team to succeed.

The sample includes 751 respondents who answered this question.

Behavioral Finance

81% of financial professionals surveyed agree that mastering behavioral finance, including the role of psychological biases and emotions, is critical for financial professionals to serve their clients and grow their practice.

The sample includes 751 respondents who answered this question.

Fiduciary Training

80% of financial professionals surveyed agree that fiduciary training is essential for minimizing compliance, litigation, and reputational risks across a financial professional's entire client base, even when no formal fiduciary duty is required.

The sample includes 751 respondents who answered this question.



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