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Benefits of Financial Planning
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What is CFP Certification?
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BENEFITS OF FINANCIAL PLANNING

THE BENEFITS OF HAVING A CERTIFIED FINANCIAL PLANNER™

Creating a financial plan helps you see the big picture and set long and short-term life goals, a crucial step in mapping out your financial future. When you have a financial plan, it's easier to make financial decisions and stay on track to meet your goals. Working with a CFP® professional can secure your financial wellbeing and give you peace of mind and help you reach financial planning success.

The Importance of Having a Financial Plan

Some people decide to do their own financial planning, but you may want to seek help from a Certified Financial Planner™ professional if you:

- Want to better manage your finances, but aren't sure where to start
- Don't have time to do your own financial planning
- Want a professional opinion about the plan you've developed
- Don't have sufficient expertise in certain areas such as investments, insurance, taxes or retirement planning
- Have an immediate need or unexpected life event

FINANCIAL PLANNING TIPS &

» [Financial Planning Guides \(http://letsmakeaplan.org/planning-resources/publications\)](http://letsmakeaplan.org/planning-resources/publications)
» [Working with a Financial Planner \(http://letsmakeaplan.org/center/FinancialPlanningP](http://letsmakeaplan.org/center/FinancialPlanningP)
» [Find a CFP® Professional \(/choose-a-cfp-professional/find-a-cfp-professional\)](http://choose-a-cfp-professional/find-a-cfp-professional)

» **MORE TIPS & RESOURCES**
(/LEARNING-CENTER)



CFP® Financial Planning

**Financial
Advisor ([/other-
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an-advisor](#))**

» **Find a CFP® professional ([/choose-a-cfp-
professional/find-a-cfp-professional](#))**

For additional information, download our
[Consumer Guide to Financial Planning \(\[/other-
resources/publications\]\(#\)\)](#).

**Financial
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**IS GETTING A LARGE
TAX REFUND A
MISTAKE?**

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s-best-for-you\)](#)

**HSA VS. FSA: WHAT'S
BEST FOR YOU?**

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plan-blogs/self-employed-
taxes-planning-and-tips\)](#)

**SELF EMPLOYED
TAXES - PLANNING
AND TIPS**