

Pro Bono Corner

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I hope you are having a wonderful start to your summer so far! It is sure lining up to be an active one for me and my family.

Status of 2018 Financial Planning Day

Many of you enjoy participating in our annual Sacramento Financial Planning Day event. We know that providing pro bono financial planning is important to many of our members, and believe that it is a foundational piece of creating a strong profession.

However, due to declining participation over the last couple years, and the significant level of effort and coordination required to hold this event, we are evaluating our options for this year's event.

As of right now, we have not yet scheduled a date or location to hold the 2018 Sacramento Financial Planning Day event.

There are many other chapters across the country dealing with the same situation. We realize that the Financial Planning event has been one that our members have enjoyed participating in over the years. But I want to ensure that the time, resources, and energy of both volunteers and participants in this event is beneficial to everyone involved.

The San Francisco chapter has been successful at connecting with community partners to host smaller events throughout the bay area. This is a model of offering pro bono financial planning that I would like our chapter to consider adopting, and I'm looking for members who are interested in helping in this effort.

If you are interested in discussing the status of our pro bono activities, including Financial Planning Days, or would like to learn how you can get involved, please email me at Landon@LeslieRoperDay.com for more information.

With that, I will encourage you to have an enjoyable, safe, and relaxing summer!