

Pro Bono Corner

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Doesn't it seem like things never slow down. As for my family, we are looking forward to April 16th (my wife does taxes), and a trip to Cancun in early May (don't hate me!)

With all of the things going on in our lives and businesses, it sometimes seems hard to squeeze in some Pro Bono work. However, small things sometimes make a big difference, so I would encourage you to look for those small opportunities regularly. I recently participated in the FPA State Advocacy Day, and was surprised to discover a number pro bono opportunities that our members were invited to participate in.

Here are some Pro Bono opportunities and ideas for you to consider:

Financial Literacy fair at the California State Capitol – Tuesday, April 17th – we are looking for 2-3 people to host a table on the grounds of the state capitol to talk with people about the FPA and how working with a financial planner can help.

Engage with your local state or federal representative – they often have activities supporting the local community for you to engage and share your expertise.

Volunteer Tax Assistance (VITA) is going strong right now helping low income citizens prepare their taxes. If you prepare taxes as part of your practice, I'd encourage you to consider joining this great organization to help folks that need your help.

Financial Planning Day – It's time to start thinking about our signature Pro Bono event again this year, and to begin forming a planning committee. If you are interested in helping coordinate our 8th Annual Financial Planning Day, please reach out to me. Planning for this event, we need all the help we can get.

If you have an idea for a Pro Bono event or activity, I welcome your suggestions. The more we can help give back to our communities with our time and expertise, the better our communities and businesses will be. Being a CFP® Professional comes with the responsibility of maintaining high standards of conduct and professionalism. As 2018 continues to march forward, let's all try to share a little more of that with those in our community who need us.

With that, I wish you an enjoyable spring!