

# Welcome

Legacy and leadership



A handwritten signature in black ink that reads "Dante De Gori".

**Dante De Gori, CFP**  
Chief Executive Officer  
*Financial Planning  
Standards Board*

**There's no doubt that 2023 was a historic year for Financial Planning Standards Board (FPSB). It was a privilege for me to assume the role of Chief Executive Officer on 1 January, following in the footsteps of founding CEO, Noel Maye. Noel's been the driving force behind FPSB for two decades, elevating the global profile of financial planning and CFP certification.**

I am excited and honored to build upon Noel's legacy. My prior experience as CEO of the Financial Planning Association in Australia (now known as FAAA) gives me a unique perspective and deep understanding of the demands of advocating for the financial planning profession and raising public awareness of the value of financial planning and CFP certification. To our network of organizations across the world, thank you for your support. I value our working relationships and united efforts to strengthen our global profession.

Every day, CFP professionals all over the world empower people to take control of their financial lives in an increasingly complex world, feel more confident and stay on track to achieve their goals.

As someone who's walked the path of financial planning myself and holds the CFP designation, I deeply value the work of our profession and the impact CFP professionals have on the well-being of individuals and families. I'm dedicated to seeing the CFP professional community grow, both in our existing territories and in new places to help more people around the world improve their financial circumstances.

This year, we undertook a comprehensive **review of FPSB's strategic framework**. Under the guidance of FPSB's Board of Directors, this review sought to refine our strategy, leveraging our strengths and sharpening our focus towards our vision and mission with the year 2030 on the horizon.

One of our major achievements this year was **launching CFP certification** for the first time in **Italy** – expanding our global presence. Worldwide, the number of CFP professionals increased by 5.1% to meet the growing consumer demand for financial planning advice. Over 223,700 CFP professionals now make up our global community.

FPSB also released **landmark consumer research** findings on the value of financial planning that found people who work with a financial planning professional are better off, with consumers who work with a CERTIFIED FINANCIAL PLANNER professional reporting the best outcomes.

We rolled out a **suite of tools and resources** to support our work across the world to improve public awareness of the benefits of financial planning, and to help more financial planning professionals and firms realize the value of the globally recognized CFP designation. We also created our **Principles of Partnership** – statements that bring to life the commitment of FPSB and our network to work together to accomplish our shared mission.

As the standards setting body for the financial planning profession, we released important **updates to the FPSB Global Financial Planning Standards** to better reflect changing client needs and expectations, as well as the evolving practice of financial planning.

Our relationship and **collaboration with global regulators** strengthened this year, notably our ties with the International Organization of Securities Commissions (IOSCO).

We celebrated our 7th annual **World Financial Planning Day**. We hosted 50 meetings across the year that brought together like-minded executives in the financial planning profession from across the globe to share, connect and collaborate. This included our successful **FPSB 2023 Global Meeting** in Singapore, which was attended by more than 70 delegates from 24 territories.

Throughout the year, I've had the privilege of traveling to many different territories and organizations to meet with CFP professionals, and present at financial planning conferences and events. A consistent theme around the world is the current and emerging role of artificial intelligence (A.I.) in financial planning. It's clear that the opportunities that A.I. brings are shaping the future of our profession.

On a personal note, 2023 was a big year for my family, too. We made the move from Sydney, Australia, to Denver, Colorado, and I want to take this opportunity to acknowledge the support of my wife and children.

To the FPSB team – we are a small but mighty group, made up of 14 people located in six cities across the world – thank you for your hard work and tireless energy this year.

I would like to acknowledge the strong support and guidance of FPSB's Board of Directors, led by chairperson Ana Cláudia Utumi, CFP. I also commend the dedication of the members of all our FPSB committees, working groups and forums for their significant contributions throughout the year.

Finally, thank you to the chief executives, staff and volunteers from our global network, whose collective efforts served to strengthen, promote and propel the global financial planning profession throughout 2023.