Welcome

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2025 was a year of momentum – shaped by collaboration across the profession and innovation that is transforming the practice of financial planning.

Against this backdrop, Financial Planning Standards Board Ltd. (FPSB) continued to deliver on its mission to advance and promote professional standards in financial planning worldwide, driven by the continued growth of the CFP professional community and deeper engagement with our network.

In 2025, the **global CFP professional community** reached 236,300 CFP professionals in 29 territories. Across FPSB's network representing more than 500,000 financial planning professionals, nearly half hold the CFP certification, underscoring the certification's standing as the global benchmark for competence, ethics and professionalism.

To build a younger, more diverse profession, FPSB supported emerging talent through global programming, including webinars on ***How to Build Your Career as a Young Financial Planner***. Interest in CFP certification also remained strong, with **more than 32,500 candidates** sitting for CFP certification exams worldwide in 2025.

Our progress in 2025 was also powered by partnership. We convened leaders from the global financial planning profession through forums, committee meetings, and annual gatherings to support shared learning and practical collaboration to strengthen the global CFP professional community. A highlight was the **FPSB 2025 Global Meeting in Chicago**, where more than 80 leaders gathered for strategic dialogue on growth and retention of CFP professionals, credentialing best practices, trademark protection, and the forces reshaping the practice of financial planning, including AI. We also recognized outstanding leadership through the **FPSB 2025 Noel Maye Award**, honoring recipients whose dedication has helped shape the global financial planning profession.

Throughout the year, members of the FPSB team **engaged with leaders from our network of organizations and CFP professionals**. These conversations reinforced the strength of our global community and helped ensure our initiatives – across certification, standards, education, public awareness, and advocacy – remain aligned to the evolving needs of the public and the profession.

We also celebrated **meaningful milestones** across the world – from Chinese Taipei surpassing 4,000 CFP professionals to Italy exceeding 100 just two years after launching CFP certification in that territory. In 2025, San Marino became FPSB's 29th territory, and a pilot program to further grow CFP certification in Colombia was launched,

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strengthening our global footprint. In Korea, the CFP certification program transitioned to FPSB International Korea, positioning the program for continued growth and impact.

In a year defined by rapid technological change, FPSB delivered timely insights and practical support. We released findings from our ***Impact of Artificial Intelligence (AI) on Financial Planning*** **global research** that drew on input from more than 6,200 financial planners in 24 territories and revealed AI uptake was strong, with financial planners using AI to streamline client data collection, risk profiling, and communications.

To keep pace with evolving client needs, **FPSB's updated global financial planning standards** took effect on 1 January 2025, reinforcing the level of practice expected of financial planning professionals worldwide. We continued to expand access to education and professional development through the rollout of ***Psychology in Practice*** resources to help financial planners strengthen client relationships and improve outcomes based on the principles from psychology, therapy, and coaching.

Our shared commitment to building public awareness of the value of financial planning was also visible in our global outreach. The ninth annual **World Financial Planning Day**, held in conjunction with IOSCO's World Investor Week, was celebrated in 22 territories. Through our support of **Global Money Week**, our network of organizations helped equip young people with foundational financial knowledge and skills to build long-term financial resilience.

Looking ahead, our global network will continue to **strengthen, promote and propel excellence in financial planning** for the benefit of the public and our global community. By deepening collaboration, setting and upholding global standards, and advancing advocacy for the profession and CFP certification, we will continue to keep the CFP marks the trusted benchmark in financial planning as the landscape evolves.

To the FPSB Board of Directors, committee members, chief executives, volunteers, and our dedicated team – **thank you** for your leadership, expertise, and commitment throughout 2025.

I also extend my sincere thanks to CFP professionals worldwide, whose professionalism and commitment to global standards bring the value of financial planning to life for millions of people every day.

Together, we are helping build a more confident, financially resilient future for individuals and families around the world.