



## Call for CFP(R) Professionals as Mentors to Arizona Financial Planning Degree Students next Fall and Spring

**Call to Action - Actions Available to Interested Readers responding by 8/31/2023**



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### **Are You Interested in Guiding our Next Generation of Financial Planning Professionals?**

During the Spring of 2023, with a very short time frame and a tailored outreach list, our chapter surfaced more than 20 community CFP® Professionals willing to offer their time and talent to help a student explore and consider a future career in financial planning.

With the Fall semester fast approaching, and expanded relationships with Academic institutions across our state, we are looking for more CFP® Professionals interested in mentoring students that are part of a Certified Financial Planning program.

The opportunity to be matched to, and mentor, a student is available to CFP® Professionals who are chapter members in good standing. Additional opportunities for firms offering internships will be forthcoming in the Spring.

The expectation is that you will meet once a month for at least 30 minutes. You are welcome to meet over coffee, schedule a Zoom call, or invite them to your office. Many of the students are looking for career guidance and would benefit from hearing about your experience in the industry and seeing what your day-to-day looks like.

If you volunteered last Spring, and you wish to continue, let the NexGen team know. If you have not yet volunteered, clearly reach out to the NexGen team.

The intention will be to organize an onboarding session (Zoom) before proceeding with any Mentor matches.

We are relying up the Fiduciary Duty of our CFP(R) Professionals as we build our nascent program, so for the time being, this opportunity is only available to CFP(R) Professionals who are current chapter members.

This is an exciting opportunity to shape our future financial planners!

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### **Need more information/help on this topic?**

Contact the chapter:

1. E-mail [Admin@FPAofPhoenix.org](mailto:Admin@FPAofPhoenix.org),
2. Use the article Headline as the email Subject line,
3. Identify the information/help you are seeking in the body of your email.

Or call us! 480-483-9035



By **Lillian Turner**, posted on 7/20/2023 for news from 7/31/2023

Lillian Turner, CFP(R) Professional, leads the Greater Phoenix NexGen Working Team

Responsibility of:

NexGen (Membership)