



About XYPN

XY Planning Network for Planners

XY Planning Network is the leading organization of fee-only financial planners who specialize in working with Gen X and Gen Y clients. We offer comprehensive resources to help financial planners run better and more successful businesses.

XYPN supports and encourages young financial planners who want to start their own firm to serve their ideal clients as well as planners who have already started their own financial planning firms. The benefits and services that our members have access to include: assistance in launching a firm and ongoing support to keep it running smoothly and successfully. The network aims to provide turnkey solutions for planners before they launch businesses, for firms in their first year, and for businesses that have existed for multiple years.

Our support system includes taking care of technology, compliance, education, and marketing needs. Other benefits to our planners include discounts on products to help them run their firms and increased access to media contacts.

XY Planning Network for Consumers

XY Planning Network is the leading organization of fee-only financial planners who specialize in helping members of Gen X and Gen Y. Our planners stand out from the rest of the financial planning industry because of the way they put their clients first:

- They offer virtual services so you can connect with your ideal planner, regardless of physical location.
- They provide a fee structure that makes sense for most members of Gen X and Gen Y. Our planners offer a flat (and affordable) monthly fee just like any other bill. They do not charge commissions.
- They're all sworn fiduciaries who uphold a fiduciary oath to always work in their clients' best interests. XY Planning Network planners are also financial-planning focused, meaning all our members offer comprehensive financial planning services for consumers. We go far beyond just investment management. We're not your parents' financial planners. But we are here to help you live your great life.

About Our Members

Our planners want to break away from outdated models of financial services businesses. They're getting the education, tools, and ongoing support they need to launch and run their own financial planning firms. They value the freedom to work with their ideal clients the way they want to serve those consumers.

XYPN members are also:

- Fee only
- Sworn fiduciaries
- Specializing in serving some segment of the Gen Y and/or Gen X market
- Financial planning focused: our members offer comprehensive financial planning services, not just investment management
- Able to offer virtual services so consumers can connect with their ideal planners regardless of physical location
- Providing fee structures that make sense for Gen X/Y
- Leading the way to more innovative practices in financial planning industry