



## LEAD THE CHANGE TO FEE-ONLY IN CANADA

**XYPN Planners Receive CFPs Membership At No Additional Cost- \$199 USF Value**

**No Need To Be Limited By Location— Have Ideal Clients Find You Via Specialty**

**Includes Status As International Member of XY Planning Network USA**

### MEMBER BENEFITS

**Personalized Planner Profile To Help Consumers Find You**

**Help Starting a Fee-Only Practice**

**Fee- Only Exclusive Community**

**Peer- To- Peer Networking**

**Marketing Support**

**Discounted E&O Insurance**

**Discounted Tax & Accounting Services**

- **One of a Kind Find a Planner Profile**—to connect with your firm’s ideal clients. By including a search by specialty and not only location, your market broadens and provides you with nationwide visibility
- **Exclusive Community** — to support you in the launch of your new financial planning firm. You don’t have to go it alone!
- **Run Fee-Only Financial Planning Firm With Less Overhead**— We know marketing can get expensive (especially when you are just starting out) that’s why as a member of XYPN Canada we help you with advertising your firm and much more!
- **Get education and training**— on building innovative and profitable service models. Access a library of resources to better your firm for Millennials and children of Boomers.

## Memberships Available:

**Standard Membership:** membership available for planners who are fee-only, have their CFP designation and can provide services virtually

**Corporate Membership:** special group rates available for larger firms

**Associate Membership:** available for members who are not CFP certificants or are in the process of transitioning to a fee-only basis.