



# 2021 ANNUAL REPORT

CELEBRATING PROGRAM  
ENHANCEMENTS, MILESTONES,  
AND MAJOR INITIATIVES

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# CCFC

The Premiere College and Student Loan  
Advising Designation and Education Program  
for Financial Professionals

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AMERICAN INSTITUTE OF  
CERTIFIED COLLEGE  
FINANCIAL CONSULTANTS

# SUCCESS IN 2021

## CONSUMER AWARENESS FOCUS

In an attempt to increase our awareness among consumers and indirectly enhance the value of the CCFC Designation, we took two separate approaches. The first was increasing the frequency and improving the relevancy of our messaging through our email distribution network and social media channels by promoting Advisor Spotlights and CCFC testimonials. The second was through thought leadership efforts by CCFC designation holders who frequently present at virtual conferences and are quoted in major media outlets, such as those listed below. Being quoted in these outlets and identified as a CCFC helps enhance the credibility of the designation while also increasing awareness.



## LPL FINANCIAL APPROVAL

In 2021, LPL Financial LLC has approved the Certified College Financial Consultant (CCFC) Designation issued by the American Institute of Certified College Financial Consultants (AICCCFC), an organization that supports financial professionals who specialize in the areas of college financial planning and student loan advising.

Advisors will be able to acquire the knowledge needed to become the “go-to” advisor for all things related to education funding, financial aid planning, and student loan advising and be armed with cutting edge software that streamlines the college planning process and enhances the deliverable they can provide to families.



LPL Financial

**The CCFC is the only comprehensive college and student loan planning designation approved for use by advisors affiliated with LPL Financial, LLC.**

## STRATEGIC PARTNER SUCCESS



The AICCCFC and the Association for Financial Counseling and Planning Education® (AFCPE®) announced a partnership that will enable members of each organization to benefit from discounts on each other's educational offerings and opportunities.

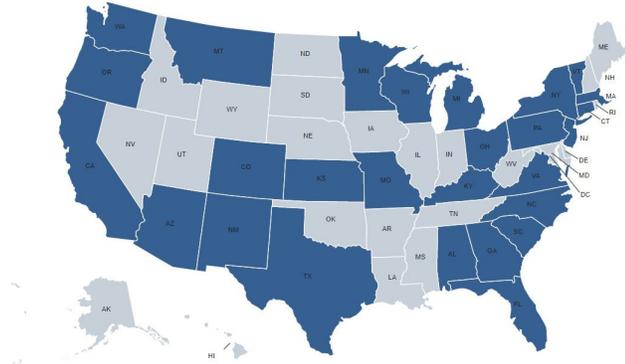


Invest in Your Success Through Education

The AICCCFC and InvystEd announced a partnership that will provide a platform for advisors to build a scalable business around college planning with access to discounted education opportunities and FinTech offerings.

# CCFC STATS

## WHERE THEY ARE



CCFCs are currently represented in 27 states and Guam.

## WHO THEY ARE

The following types of financial professionals have chosen to pursue the CCFC Designation:

- **Attorneys**
- **Divorce Planners**
- **Financial Planners**
- **Financial Counselors**
- **Investment Advisors**
- **Tax Professionals**
- **Wealth Managers**

## HOW THEY OPERATE

CCFC Designation holders are able to provide education planning services in a variety of ways. Here are some of the more popular ways CCFCs are able to generate revenue while adding value for their clients:

- **Hourly Planning**
- **Project-Based Planning (Financial Aid Form Filings, Student Loan Analysis, etc.)**
- **Comprehensive Financial Planning**
- **Value Added Planning (Service included in AUM fee and not billed separately)**

## CCFCs BY THE NUMBERS (AS OF 12/31/2021)

# 101

Number of financial professionals who held the **CCFC designation**.

# 55

Number of financial professionals who were currently pursuing the **CCFC designation**.

# 75

Percentage of CCFC designation holders who also possessed either the **CPA, CFP, or ChFC designations**.

# 25

Percentage of CCFC designation holders who are **women in the financial services industry**.

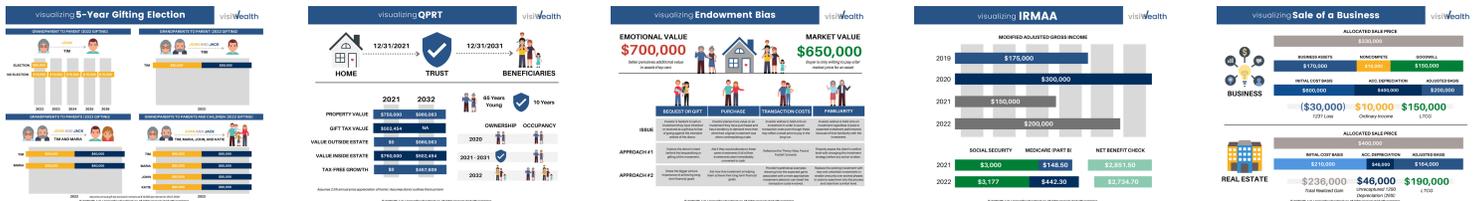
# 2022 INITIATIVES

## COURSE CONTENT UPDATES

We are targeting **May 2022** for the next major update/release of the CCFC education course. As always, current CCFCs will have access to the updated course content at no additional charge as long as they remain a member in good standing and renew their annual dues.

## FREE ACCESS TO VISIWEALTH

As an added benefit for CCFC designation holders who remain current with their annual dues and in good standing, they will receive complimentary access to **visiWealth Essentials**, the preferred way to access high resolution visuals of strategies and concepts related to education planning, estate planning, investment planning, retirement planning, and tax planning.



## INTEGRATING WITH CHFC CURRICULUM

Later in 2022, we are excited to announce that content from the Financial Aid Planning and Student Loan Advising modules within the CCFC designation program/AICCCFC education course will be featured as modules in the **Chartered Financial Consultant (ChFC)** designation program, which is issued by the American College of Financial Services.

THE AMERICAN COLLEGE OF FINANCIAL SERVICES



## CPA CPE APPROVAL

We are currently working to get the CCFC Designation program approved for **continuing professional education (CPE) for CPAs in all 50 states**. We will make our progress towards this initiative available as we receive approval or determine that our programs meet the requirements set forth by NASBA and/or each individual state's continuing education guidelines.