

Non-profit Makes Pro Bono Financial Planning More Accessible and Impactful With Leading FinTech Partners

The new FinTech partnerships with Steady and EarnUp, set Advisers Give Back on the path to ultimately serve millions of Americans struggling with their money.

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/EINPresswire.com/ -- At the start of [Financial Planning](#) Month, Advisers Give Back, the first and only non-profit FinTech platform dedicated to making [pro bono financial planning](#) easier and more impactful for both financial advisers and pro bono clients, is announcing partnerships with two leading FinTech companies, Steady and EarnUp, who collectively serve over three million low- and moderate-income individuals. These FinTech partnerships will provide a consistent stream of pro bono clients as Advisers Give Back begins to scale up.

In order to accelerate growth and open up more volunteer opportunities for financial planners, Advisers Give Back has created a microsite for financial services professionals detailing how the program advances the financial planning profession, with the goal of signing up 100 more advisers to provide remote pro bono services and raising at least \$100,000 to facilitate growth during Financial Planning Month.

<https://advisersgiveback.org/advisers>

“These FinTech partnerships represent the missing piece of the puzzle. We know that there is a strong demand from financial advisers to give back, and up until now the main issue has been

Advisers Give Back

On a mission to close the racial and gender wealth gaps by increasing access to independent financial advice for millions of Americans.



A pro bono financial planner talks with a pro bono client

providing advisers with a consistent stream of pro bono clients. Mature FinTechs such as Steady and EarnUp can reliably deliver over 500 pro bono clients each month and we're excited to build more partnerships like these," said Advisers Give Back Executive Director, Matt Iverson-Comelo.

Advisers Give Back is supported by industry luminaries such as Nerd's Eye View's Michael Kitces, past President of the Financial Planning Association®, Frank Paré, and Duke behavioral economist, Dan Ariely. In addition to FinTech companies, Advisers Give Back is working with chapters of local nonprofits to serve more pro bono clients, including the YWCA, Dress for Success and KIPP Schools.



A pro bono client speaks with their pro bono financial planner

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*Matt Iverson-Comelo,
Executive Director at Advisers
Give Back*

dedicated in-house assistants that amplify the advisers' impact with clients and measure the long-term impact of the pro bono advice delivered,” explained Iverson-Comelo. “By this time next year we anticipate having over 1,000 financial advisers volunteering through the platform, as we work to prove that financial planning isn't just for wealthy individuals.”

“Steady is on a mission to improve the incomes and overall

financial well-being of hourly, 1099 and mixed earners, and we believe that should include access to a trusted financial planner to help them achieve their goals,” said Steady Co-Founder Adam Roseman. “Our partnership with Advisers Give Back provides a valuable pro bono benefit to our diverse community as we work together to close socioeconomic inequities.”

“The people who use EarnUp to save money and boost their credit scores through on-time or early loan payment have already demonstrated a commitment to improving their financial health,” said Nadim Homsany, co-founder and CEO of EarnUp. “Partnering with Advisers Give Back to give them free, easy access to trusted, top-notch financial planners is a no-brainer. Together, we can put financial knowledge and tools in the hands of those who need it the most.”

While traditional pro bono activities are valuable and necessary, their distributed nature makes

having a large impact extremely challenging. By providing low- and moderate-income Americans with an online destination to receive pro bono financial planning when it's convenient for both them and the adviser, while managing all the overhead and infrastructure, Advisers Give Back aims to democratize financial planning.

Financial services professionals can learn more about how Advisers Give Back advances the profession, as well as volunteer and donate, by visiting: AdvisersGiveBack.org/advisers.

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About Advisers Give Back

Advisers Give Back is a 501(c)(3) non-profit providing an online platform that connects pro bono financial planners with low- and moderate-income individuals seeking help with their money. Unlike traditional pro bono events, Advisers Give Back's virtual platform makes pro bono more accessible, while ongoing pro bono client engagements and dedicated Advisers Give Back assistants ensure greater client impact. Advisers Give Back is on a mission to close the racial and gender wealth gaps by increasing access to independent financial advice for millions of Americans. To learn more, visit: <https://advisersgiveback.org/>

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