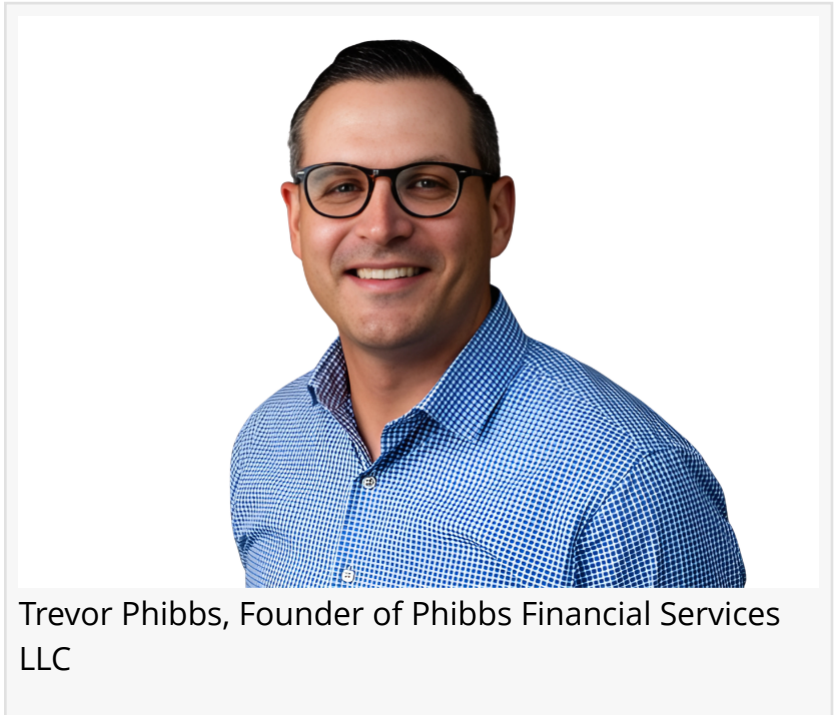


Trevor Phibbs Earns CERTIFIED FINANCIAL PLANNER® Designation, Joining Select Group of CFP® Professionals in Utah

DRAPER, UT, UNITED STATES, June 2, 2026 /EINPresswire.com/ -- Phibbs Financial announced that its founder, Trevor Phibbs, has successfully passed the CFP® examination and earned the CERTIFIED FINANCIAL PLANNER® designation. With this achievement, Phibbs joins an exclusive group of approximately 1,200 professionals* in the state of Utah who hold the credential widely regarded as the gold standard in financial planning.

The CFP® certification is awarded by the Certified Financial Planner Board of Standards (CFP Board) and requires candidates to meet rigorous requirements in education, examination, experience, and ethics. The comprehensive exam covers financial planning topics, including retirement planning, tax strategy, investment management, insurance, and estate planning.



“

We want to help as many retirees experience the retirement they deserve, whether they work with us or not.”

Trevor Phibbs

Phibbs completed the Executive Program in Financial Planning at the Terry College of Business at the University of Georgia as an eligibility prerequisite to earn the CFP® marks.

"I think it is our ultimate responsibility to the families that trust us with their retirement planning to never become complacent," said Phibbs. "I truly believe that wisdom is wealth, which is why we publish no-cost informational

content on our website and YouTube. We want to help as many retirees experience the retirement they deserve, whether they work with us or not. I wanted to illustrate that I practice

what I preach, so becoming a CERTIFIED FINANCIAL PLANNER® was an opportunity to do exactly that.”

Phibbs founded Phibbs Financial with a clear mission: to build a comprehensive financial firm that exclusively specializes in working with those 50 years or older to allow the advice to become laser-focused in the strategies and techniques required to help its clients confidently give themselves permission to spend their hard-earned money during the best years of their lives.

Before launching his own practice, Phibbs worked at a Fortune 100 financial institution, where he grew disillusioned with an industry culture focused on asset gathering and sales quotas rather than genuine client outcomes. That experience motivated him to build a firm grounded in transparency, communication, and comprehensive retirement planning.

The firm offers a no-cost Retirement Inspection® designed to help retirees evaluate their retirement readiness across income planning, tax efficiency, and investment alignment.

About Phibbs Financial

Phibbs Financial Services LLC is a fiduciary registered investment advisory firm headquartered in Draper, Utah. The firm specializes in retirement planning, helping clients create reliable income, use strategies designed to lower lifetime taxes, and invest with purpose. To learn more, visit phibbsfinancial.com.

DISCLOSURE

Investment advisory services offered through Phibbs Financial Services LLC (“Phibbs Financial”), a registered investment advisor in the state of Utah and other jurisdictions where exempted. Insurance products and services offered and sold separately through Phibbs Insurance Services LLC in all appropriate jurisdictions. Licensed Insurance Professional.

Phibbs Financial does not provide legal or tax advice. While tax or estate matters may be discussed as part of financial planning, you should consult a qualified attorney, CPA, or tax professional before making decisions regarding your specific situation.

* <https://www.cfp.net/industry-insights/reports-and-statistics/professional-demographics>

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