



NEWS RELEASE

SoFi Partners with the Financial Planning Association to Provide Exclusive Access to Suite of Financial Solutions to FPA Members and Clients

11/9/2021

SAN FRANCISCO--(BUSINESS WIRE)-- **SoFi** (NASDAQ: SOFI), a leading next-generation financial services platform, and the **Financial Planning Association®** (FPA®) – the leading professional membership association for Certified Financial Planner™ professionals – today announced the launch of a strategic partnership between the two organizations designed to benefit nearly 19,000 FPA financial planning practitioner members and the clients they serve.

The partnership will provide FPA members with preferred rates and exclusive access to a suite of financial solutions, services, and educational resources that they're able to tap into to better support the hundreds of thousands of consumers the organization's members are already guiding on their path to financial independence. This joint initiative led by SoFi and FPA marks SoFi's first external foray into the financial planning industry at a time when a record-breaking number of consumers are seeking professional financial advice¹.

"Making progress in personal finance doesn't have to mean navigating that journey alone – at SoFi, we've always seen tremendous value in the financial advisor community, which is why access to complimentary financial planning services has been a member benefit since day one," said SoFi CEO, Anthony Noto. "Our partnership with FPA is an expansion of that trust and is rooted in a shared commitment to helping people get their money right on their financial journey. This means equipping the professional community that serves consumers with the financial solutions and services their clients can benefit from so that all advisors – regardless of firm size – have access to the tools they need to help their clients achieve financial independence and realize their ambitions."

"Financial planners are on the front lines of helping American families safeguard their financial well-being. That means they require access to the necessary tools that help them serve the needs of their clients – like those offered by SoFi," says Patrick D. Mahoney, FPA chief executive officer. "We're thrilled to have this opportunity to partner



with SoFi to bring a variety of financial solutions to our members – and to our members’ clients.”

For more information on SoFi’s partnership with FPA visit the **FPA Marketplace**.

About SoFi

SoFi’s mission is to help people achieve financial independence to realize their ambitions. Our products for borrowing, saving, spending, investing and protecting give our more than two million members fast access to tools to get their money right. SoFi membership comes with the key essentials for getting ahead, including career advisors and connection to a thriving community of like-minded, ambitious people. SoFi is also the naming rights partner of SoFi Stadium, home of the Los Angeles Chargers and the Los Angeles Rams. For more information, visit <https://www.sofi.com/> or download our iOS and Android apps.

About the Financial Planning Association

The Financial Planning Association® (FPA®) is the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals, educators, financial services professionals and students who are committed to elevating the profession that transforms lives through the power of financial planning. With a focus on the practice, business and profession of financial planning, FPA advances financial planning practitioners through every phase of their careers, from novice to master to leader of the profession. Learn more about FPA at financialplanningassociation.org and Twitter at twitter.com/fpassociation.

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1Northwestern Mutual, **After a Year of Uncertainty the Value of Professional Financial Advice Goes Up**, July 2021

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Source: SoFi Technologies