

# Global Personal Financial Planning Service Market Growth (Status and Outlook) 2024-2030

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## **Abstracts**

The report requires updating with new data and is sent in 48 hours after order is placed.

Personal Financial Planning Service is a professional service that helps individuals or families manage their financial resources. The service covers areas such as financial goal setting, budget management, investment planning, tax optimization, retirement planning, insurance needs assessment and estate planning. Through financial planning, clients are better able to achieve financial stability and future goals. The service is usually provided by a certified financial planner (CFP) or financial advisor to develop a customized financial strategy for the client.

The global Personal Financial Planning Service market size is projected to grow from US\$ million in 2024 to US\$ million in 2030; it is expected to grow at a CAGR of %from 2024 to 2030.

LPI (LP Information)' newest research report, the "Personal Financial Planning Service Industry Forecast" looks at past sales and reviews total world Personal Financial Planning Service sales in 2022, providing a comprehensive analysis by region and market sector of projected Personal Financial Planning Service sales for 2023 through 2029. With Personal Financial Planning Service sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Personal Financial Planning Service industry.

This Insight Report provides a comprehensive analysis of the global Personal Financial Planning Service landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on



Personal Financial Planning Service portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Personal Financial Planning Service market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Personal Financial Planning Service and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Personal Financial Planning Service.

United States market for Personal Financial Planning Service is estimated to increase from US\$ million in 2023 to US\$ million by 2030, at a CAGR of % from 2024 through 2030.

China market for Personal Financial Planning Service is estimated to increase from US\$ million in 2023 to US\$ million by 2030, at a CAGR of % from 2024 through 2030.

Europe market for Personal Financial Planning Service is estimated to increase from US\$ million in 2023 to US\$ million by 2030, at a CAGR of % from 2024 through 2030.

Global key Personal Financial Planning Service players cover Evelyn Partners, Atomos, Acumen Financial, Citizens Advice, Buzzacott, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2023.

This report presents a comprehensive overview, market shares, and growth opportunities of Personal Financial Planning Service market by product type, application, key players and key regions and countries.

Segmentation by Type:

Investment Planning

Retirement Planning

Tax Planning



In	surance Planning	
Ot	thers	
Segmenta	ation by Application:	
Ri	isk Management	
In	vestment Optimization	
Ot	thers	
This repo	rt also splits the market by region:	
Ar	mericas	
	United States	
	Canada	
	Mexico	
	Brazil	
AF	PAC	
	China	
	Japan	
	Korea	
	Southeast Asia	
	India	
	Australia	

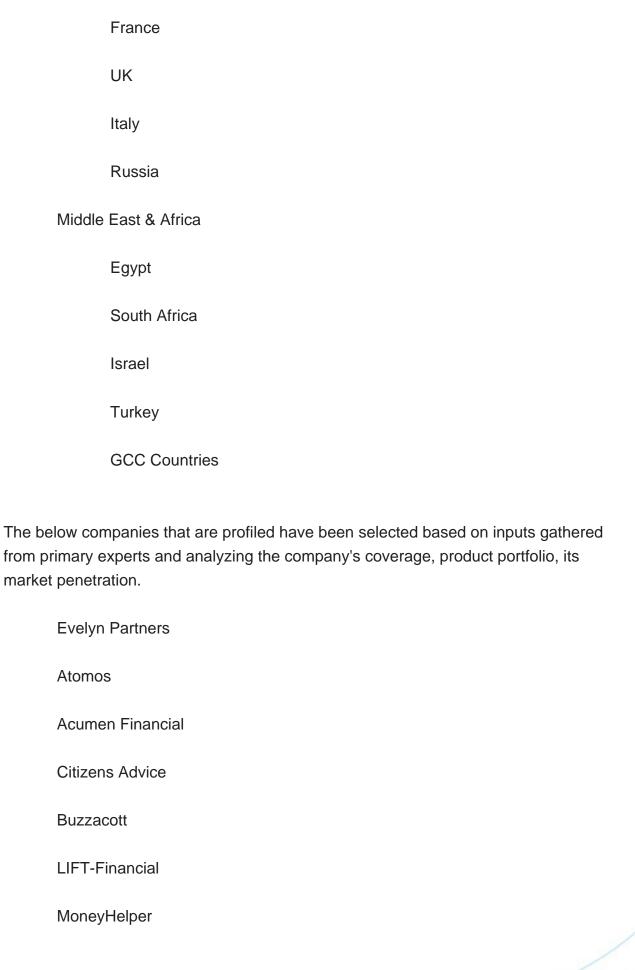


Euro	Europe		
	Germany		
	France		
	UK		
	Italy		
	Russia		
Midd	dle East & Africa		
	Egypt		
	South Africa		
	Israel		
	Turkey		
	GCC Countries		
Segmentation	on by Type:		
Inve	stment Planning		
Reti	rement Planning		
Tax	Planning		
Insu	rance Planning		
Othe	ers		



Segmentation by Application:		
Risk M	lanagement	
Investr	ment Optimization	
Others	;	
This report als	so splits the market by region:	
Americ	cas	
	United States	
	Canada	
	Mexico	
	Brazil	
APAC		
	China	
	Japan	
	Korea	
	Southeast Asia	
	India	
	Australia	
Europe	e	
	Germany	







Mazars	
Fidelity Investments	
Charles Schwab	
Edward Jones	
Betterment	



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Figure 77. Global PersonalFinancial Planning Service Market Size Market ShareForecast byType (2025-2030)

Figure 78. Global PersonalFinancial Planning Service Market Size Market ShareForecast by Application (2025-2030)



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