Information and Resources to Promote
Qualified Associate Financial Planner™ Certification.



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## How to start the conversation around QAFP® Certification

It is important to build a conversation around the profession of financial planning before talking about QAFP certification. Students are likely to engage more when they have answers to questions such as:

- Why become a financial planner?

- What do financial planners do?

- What will my future job titles sound like?

- Who employs financial planners?

- Why do I need a professional certification?

We urge you to use the following information and resources to talk about financial planning as a profession as a lead-up to the conversation about QAFP certification.

Head to: [**Promote Financial Planning as a career**](https://fpcanada.ca/docs/default-source/students/fp-as-a-career-content.docx?sfvrsn=fe39dec8_2)
You can also urge students to head to [www.becomeafinancialplanner.ca](http://www.becomeafinancialplanner.ca) to learn more about the profession of financial planning.

## what is Qualified Associate Financial Planner™ Certification?

Qualified Associate Financial Planner™ certification demonstrates a financial planner's competence and commitment to high ethical standards including putting their clients’ interests first. This certification demonstrates a QAFP® professional’s ability to offer holistic financial advice for today's speed of life. QAFP professionals have proven they have the knowledge, skills, experience, and ethics to provide financial planning strategies and solutions for clients who are in the process of building their financial well-being. QAFP certification can also be a stepping-stone to Certified Financial Planner® certification.

QAFP professionals are certified by FP Canada™, a national, not-for-profit professional body working in the public interest. QAFP certification has also been approved by the Financial Services Regulatory Authority of Ontario (FSRA) as a valid credential for individuals using the Financial Planner title in Ontario.

Learn more at [www.becomeafinancialplanner.ca](http://www.becomeafinancialplanner.ca)

## Who is FP Canada™ and how do they play a role here?

Established in 1995, FP Canada is a national not-for-profit education, certification, and professional oversight organization working in the public interest. FP Canada is dedicated to championing better financial wellness for all Canadians by leading the advancement of professional financial planning across the country. There are about 17,000 CERTIFIED FINANCIAL PLANNER® professionals and about 1,900 QUALIFIED ASSOCIATE FINANCIAL PLANNER™ professionals as at December 31, 2022, who are held to FP Canada’s rigorous professional and ethical standards. Visit the [FP Canada website](http://www.fpcanada.ca) for more information.

## The impact a QAFP® professional can have on the lives of Canadians

People’s financial lives expand and grow more complex as they take on more responsibility. Setting goals and creating strategies to achieve those goals earlier forms the foundation of their financial well-being in the future. With the right holistic financial plan, they can adapt to change with less stress and adjust as their future becomes clear.

Qualified Associate Financial Planner™ professionals are certified to have the up-to-date knowledge and skills, and the ethics to help individuals manage their wealth-building years by providing trustworthy, holistic advice that matches their changing life and positions them to achieve their goals for life.

## Why earn a professional certification?

Getting certified is important because it demonstrates that an individual meets stringent proficiency and ethics requirements, including high levels of education and experience.

1. **Knowledge and skills**: Confirms that you have the knowledge, skills, experience, and ethics to provide financial advice

2. **Professional responsibility**: Shows your commitment to the highest ethical standards

3. **Professional brand**: Demonstrates your value to employers and clients

4. **Regulatory requirements**: Ensures that you keep pace with evolving legal and regulatory requirements

5. **Trust:** Fosters trust in the advice Canadians receive from you

In recent years, provincial governments in Ontario and Saskatchewan have passed laws requiring financial planners in those provinces to demonstrate their competence and professionalism by obtaining a financial planning certification. QAFP® certification has been approved by the Financial Services Regulatory Authority of Ontario (FSRA) for use of the financial planner title in Ontario We look forward to other provinces implementing similar harmonized requirements in the future.

## Wonder what a day in the life of a QAFP professional might look like?

You can learn more about QAFP professionals through FP Canada’s [Day-in-the-life series](https://www.fpcanada.ca/become-a-financial-planner/what-financial-planners-do#DITL).
FP Canada reached out to professional financial planners with the intent of bringing their stories to future professionals (such as yourselves). These stories will not only provide a sneak peek into the lives of these successful professionals but can also help you understand the key personality traits that lead to success in the profession of financial planning.

Learn more at <https://www.fpcanada.ca/become-a-financial-planner/what-financial-planners-do#DITL>

## Helpful Links and Resources

1. Learn more about your career in financial planning at:
[www.becomeafinancialplanner.ca](http://www.becomeafinancialplanner.ca)
2. Download the QAFP Certification brochure:
<https://www.fpcanada.ca/docs/default-source/students/qafp-brochure_final.pdf>
3. Sign-up for exclusive promotions, industry events, news, and updates about FP Canada certifications:
<https://www.fpcanada.ca/become-a-financial-planner/home#SignUp>
4. Download FP Standard to stay up-to-date with ideas, thoughts and trends in the financial planning profession: <https://www.fpcanada.ca/docs/default-source/default-document-library/fp-standard-autumn-2023.pdf?sfvrsn=134e4e7b_3>
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