



GUIDELINES FOR THE PROFESSIONAL EDUCATION ACCREDITATION PROGRAM FOR CFP[®] CERTIFICATION

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Contents

- About FP Canada™ 2
- About CFP Certification 2
- About Introduction to Professional Ethics 3
- About the CFP Professional Education Program 4
- Professional Education Accreditation Program for CFP Certification 4
- Professional Education Accreditation Program Benefits 4
- Accreditation Requirements 5
 - Education Provider Requirements 5
 - Faculty Requirements 6
 - Student Requirements 7
- Academic Misconduct 7
- Accreditation Application Process 8
 - Overview 8
 - Supporting Documentation 8
 - Review 8
 - Program Fees 9
- FP Canada-Accredited Professional Education Providers 10
 - Onboarding Process for Education Providers 10
 - Learning Platform Information and Education Delivery 10
 - Course Updates and Renewal of Accreditation 10
- Appendix A: CFP Professional Education Program 11
- Appendix B: Completing the Accreditation Application 15
- Appendix C: Annual Update Form 17

About FP Canada™

A national professional body working in the public interest, FP Canada is dedicated to championing better financial wellness for all Canadians by certifying professional financial planners and leading the advancement of professional financial planning in Canada. At a time when society is facing unprecedented technological disruption in all walks of life, Canadians have a greater need than ever for personalized financial planning advice with a human touch. FP Canada provides the financial planning profession with the leadership it needs to help Canadians achieve financial well-being in this new digital era.

At a high level, FP Canada sets the strategic direction for professional financial planning in Canada. FP Canada also achieves its mandate through two distinct divisions. Through the FP Canada Standards Council™ division, FP Canada establishes financial planning standards and enforces those standards among FP Canada certificants—QUALIFIED ASSOCIATE FINANCIAL PLANNER™ professionals and CERTIFIED FINANCIAL PLANNER® professionals. Through the FP Canada Institute™ division, which is dedicated to elevating the practice of financial planning, FP Canada provides professional education, tools, and resources to help financial planners meet the needs of all Canadians.

FP Canada operates in all provinces except Québec; however, through a strategic partnership with Institut québécois de planification financière (IQPF), the only body in Québec authorized to confer financial planning diplomas, FP Canada's standards are adopted nationally. There are about 17,000 CFP professionals and about 2,000 QAFP™ professionals (as at June 30, 2022), who meet FP Canada's standards.

In Ontario, FP Canada has been approved by the Financial Services Regulatory Authority of Ontario (FSRA) as a credentialing body to grant and oversee Financial Planner title use under the *Financial Professionals Title Protection Act, 2019*. CERTIFIED FINANCIAL PLANNER certification and QUALIFIED ASSOCIATE FINANCIAL PLANNER certification have been approved by FSRA for use of the Financial Planner title in Ontario.

In other provinces, with the exception of Québec, those who call themselves financial planners are not required to obtain any credentials whatsoever. At FP Canada, we believe that everyone using the financial planner title should be required to meet minimum standards of education and experience, subject to stringent ethical requirements, actively supervised by a recognized credentialing body and subject to a rigorous complaints and discipline process. These requirements are met by all CFP professionals and QAFP professionals.

Regulating the use of the Financial Planner title benefits consumers by providing them with the clarity and confidence they need when seeking professional financial planning advice to help them achieve financial wellness.

About CFP Certification

The most widely recognized financial planning designation in Canada and worldwide, the CERTIFIED FINANCIAL PLANNER designation provides assurance to Canadians that the design of their financial future rests with a professional who will put their clients' interests ahead of their own.

There are approximately 17,000 CFP professionals across Canada, part of an international network of more than 200,000 CFP professionals in 26 territories around the world.

CFP certification is considered the standard for the financial planning profession worldwide. CFP professionals have demonstrated the knowledge, skills, experience and ethics to examine their clients' entire financial pictures at the highest level of complexity required of the profession, and to work with their clients to build financial plans so their clients can Live Life Confidently™.

Candidates wishing to obtain CFP certification via the Direct Path must:

- a. Successfully complete Technical Education (Core and Advanced)
- b. Successfully complete FP Canada Institute Introduction to Professional Ethics (IPE);
- c. Successfully complete the FP Canada Institute CFP Professional Education Program;
- d. Pass the CFP examination;
- e. Hold a post-secondary degree or have an approved exemption; and
- f. Complete three years of qualifying financial planning experience.

The following is a visual overview of the Direct Path to CFP Certification.



Students who complete steps 1 to 3 are also eligible to register for the QAFP exam should they decide to pursue QAFP certification, which requires only one year of work experience.

* Qualifying work experience can be completed at any point prior to starting or while on the path to certification, but it must be completed in the eight years preceding your application for CFP certification and within four years following the successful completion of the CFP examination.

About Introduction to Professional Ethics

The FP Canada Institute Introduction to Professional Ethics (IPE) course equips students with the requisite foundational knowledge of the ethical obligations owed by all professionals, and the specific application of these obligations to financial planning practice. IPE teaches students the distinction between integrity-based professional obligations and compliance-based obligations, with emphasis on the financial services landscape. The course introduces the specific professional obligations of QAFP professionals and CFP professionals, why they matter and what they mean in practical terms.

About the CFP Professional Education Program

The CFP Professional Education Program, developed by the FP Canada Institute, provides practical and actionable knowledge that teaches you how to apply your technical education to real-life client situations, in the practice of financial planning.

The Program focuses on a “3H” financial planning approach – Holistic, Human, and Honest.

Holistic Financial Planning: applying your knowledge while understanding all of your client’s circumstances, priorities and goals

Human Behaviour: understanding human behaviour and how clients make decisions

Honesty and Ethics: knowing your professional and ethical responsibility as a financial planner

The student will be awarded the Advanced Certificate in 3H Financial Planning™, by FP Canada, upon successful completion of the program, with easy-to-share digital credentials.

The learning objectives for the CFP Professional Education Program are provided in [Appendix A](#).

FP Canada’s Professional Education Accreditation Program for CFP Certification

FP Canada’s Professional Education Accreditation Program for CFP Certification (the “Accreditation Program”) enables eligible post-secondary education providers to offer a more efficient pathway to students pursuing CFP certification. The program provides the opportunity for post-secondary education providers to offer end-to-end education required for CFP certification, including both the technical and professional education, as well as the degree which allows graduates to satisfy FP Canada’s post-secondary requirements.

Until now, all CFP certification candidates had to complete the Introduction to Professional Ethics (IPE) course and the CFP Professional Education Program through the FP Canada Institute, separately from their Core and Advanced Curriculum. Students enrolled with an eligible post-secondary education provider will now be able to meet all of the education requirements for CFP certification through a single program, and advance directly to the CFP exam upon graduation.

FP Canada will provide all IPE and CFP Professional Education Program content to be delivered through their FP Canada-accredited Professional Education, including online content, assignments, marking guides, rubrics and assessments (the “Professional Education Content”).

For more information go to [FP Canada-Accredited Professional Education Providers](#).

Professional Education Accreditation Program Benefits

Eligible post-secondary education providers will be able to offer and promote the following benefits to their graduates:

- **Students will graduate ready to write the CFP examination or QAFP examination:** Offering the complete suite of technical and professional education will allow post-secondary education providers to offer this efficient pathway to their program’s students.

- **Students will acquire applied learning to compliment their technical skills:** The Professional Education curriculum uses real-life illustrated case studies that better prepare them for their work in the financial planning profession.
- **Greater Job Prospects:** Employers value graduates who are exam ready.
- **Digital Credentials:** Graduates of FP Canada-accredited Professional Education will be able to demonstrate their skills to potential employers with FP Canada Institute digital credentials which they can share on multiple platforms.

Accreditation Requirements

Education Provider Requirements

To be accredited to deliver FP Canada-accredited Professional Education, the education provider must:

1. Be a post-secondary institution (“PSI”) that is accredited by the appropriate regulatory authorities in Canada to grant degrees;
2. Offer FP Canada-approved Core and Advanced Curriculum within a degree program or an advanced diploma program with a degree pathway;
3. Require that their FP Canada-approved Core and Advanced Curriculum courses be pre-requisites for enrolling in their FP Canada-accredited Professional Education;
4. Deliver IPE and the CFP Professional Education Program in its entirety within its FP Canada-accredited Professional Education, including all Professional Education Content.
5. Provide student results to FP Canada upon completion of the FP Canada-accredited Professional Education;
6. Require all individuals teaching or supporting students in the FP Canada-accredited Professional Education, including full-time faculty, part-time faculty, volunteers, contract markers and teaching assistants (the “Faculty”) sign the Faculty Attestation Form before FP Canada accreditation is granted and before being granted access to the FP Canada Institute Professional Education Content;
7. Update FP Canada if and when there are any changes to Faculty and submit resumés for any new Faculty along with the payment of Faculty Access Fees, where applicable, to ensure that Faculty requirements continue to be met. Education providers must update FP Canada annually by completing an Annual Update Form provided by FP Canada included as [Appendix C](#); and
8. Agree with all Terms and Conditions of FP Canada Professional Education Accreditation and requirements as set out in the Guidelines.

Faculty Requirements

In addition to the Education Provider Requirements, in order to be accredited, the Faculty responsible for delivering FP Canada-accredited Professional Education must meet the following requirements:

1. The Faculty must include individuals with the following certification, experience, and education qualifications:
 - a. **Current CFP certification** and in good standing with FP Canada; and
 - b. **At least five years of qualifying financial planning experience**¹ within the last 10 years; and
 - c. **Formal education** in behavioural science, behavioural economics and/or behavioral psychology. This requirement can be met by:
 - ii. Completion of a post-graduate level program in behavioural science, behavioural economics and/or behavioral psychology; or
 - iii. Completion of the Human Behaviour Concentration of the FP Canada Institute's [Advanced Certificate in 3H Financial Planning](#), provided to Faculty at a reduced cost.²

In cases where the Faculty does not meet these requirements, but the Education Provider believes the certifications, experience, and educational qualifications of the Faculty, considered as a whole, qualify the Education Provider to deliver FP Canada-accredited Professional Education, the Education Provider may apply for an exception to the certifications, experience and background requirements for Faculty. FP Canada will review and may grant exceptions to the certifications, experience and background requirements for Faculty. In order to be considered for an exception, educators must provide evidence of the Faculty's collective qualifications to teach FP Canada-accredited Professional Education.

9. Faculty coverage must be sufficient in order to ensure regular course offerings and avoid disruptions for students;
10. Faculty must evaluate student performance on all FP Canada-accredited Professional Education assignments and the final assessment, and are fully responsible for student support as it relates to the FP Canada-accredited Professional Education (technical support for the online learning platform will be provided by FP Canada);
11. Faculty must agree to protect FP Canada's Institute's Professional Education Content by signing the Faculty Attestation Form before being granted access to the content
12. Faculty must advise students enrolled in the FP Canada-accredited Professional Education that they are required to register directly with FP Canada in order to gain access to the online Professional Education Content and provide them with a custom application link provided by FP Canada;

¹ Qualifying work experience is based on a 35-hour work week and is defined as full-time (or equivalent part-time) financial planning related employment or self-employment. Experience must be client-facing and involve the application of the knowledge, skills and abilities described in the FP Canada Standards Council Competency Profile.

² Educators will receive a 50% discount (\$975.00 for AC3H Certificate Program and \$325.40 for Human Behaviour Concentration)

13. Two weeks after the start of FP Canada-accredited Professional Education, Faculty must advise FP Canada of any student withdrawals from the course; and
14. Faculty must provide students enrolled in FP Canada-accredited Professional Education with information provided by FP Canada on planned FP Canada student events, important deadline dates and other updates.

Student Requirements

In order to complete the FP Canada-accredited Professional Education, students must:

1. Successfully complete the pre-requisite FP Canada-approved Core and Advanced Curriculum courses prior to enrolling;
2. Register directly with FP Canada by the prescribed deadline date, providing all relevant contact information and agreement to all FP Canada student terms and conditions required for access to the online Professional Education Content;
3. Complete FP Canada-accredited Professional Education in full, including IPE³ and all practice assignments and the final assessment, achieving a minimum overall grade of 60%; and
4. Provide a transcript to FP Canada showing successful completion of the Core and Advanced Curriculum and FP Canada-accredited Professional Education before registering for the FP Canada examinations.

Academic Misconduct

The FP Canada Standards Council (the “Standards Council”) is responsible for ensuring that both FP Canada certificants and candidates for certification with FP Canada, meet rigorous certification standards and demonstrate the highest level of integrity and professionalism. Being found by FP Canada-approved education providers, to have breached their code of ethics or code of conduct and/or to have engaged in academic misconduct is a Presumptive Bar to certification with FP Canada.

FP Canada has agreements with several academic partners pursuant to which those academic partners have agreed to report findings of academic misconduct to FP Canada. We strongly encourage academic partners who deliver FP Canada-accredited Professional Education to enter into such an agreement with FP Canada to protect the integrity of IPE, the CFP Professional Education Program and FP Canada certifications as well as the integrity of their own programs leading to certification by FP Canada. Reach out to Tamara Center, Director, Professional Conduct and Enforcement, at tamara.center@fpcanada.ca for more information on initiating an agreement.

Where such an agreement is not in place and where an academic partner determines that a student has engaged in conduct that breaches their academic code of ethics or code of conduct, we encourage the academic partner to report the finding to FP Canada. Where possible, such reports should include the specific finding of academic misconduct, the name of the student, the sanctions imposed by the educator and copies of any relevant documents (redacted as appropriate to protect the identities of

³ Students who failed to complete IPE as part of their FP Canada-accredited Professional Education will be expected to enroll in and successfully complete IPE through the FP Canada Institute at their own expense before they will be able to register for FP Canada certification examinations.

third parties). Reporting student misconduct assists the Standards Council in ensuring those individuals who apply for and obtain certification with FP Canada meet the certification requirements, in the public interest, and demonstrate the highest level of integrity and professionalism. Such reporting also serves to guard the trust that Canadians place in FP Canada-certified individuals. Working together to protect this trust in FP Canada certifications benefits professional financial planners, educators, industry and all Canadians and fosters confidence in FP Canada's academic partnerships and accreditation process.

Accreditation Application Process

Overview

In order to obtain accreditation, Education Providers must:

1. Review these Guidelines thoroughly, specifically the [Educator Provider Requirements](#) and [Faculty Requirements](#), to determine eligibility;
2. If eligible, complete FP Canada's Application for Accreditation of Professional Education for CFP Certification ("Accreditation Application");
3. Send completed Accreditation Application and supporting documents to education@fpcanada.ca
4. FP Canada will review the Accreditation Application and notify you with the results.

For more information please see [Accreditation Application Process](#).

Supporting Documentation

In addition to filling out each section of the Accreditation Application, education providers must also submit the following supporting documentation:

- The course outline;
- Faculty CVs; and
- All Faculty Attestation Forms.

An electronic copy of the application, along with required supporting documents can be emailed to education@fpcanada.ca. FP Canada reserves the right to request additional information at its sole discretion.

See [Appendix B](#) for guidance on filling out the Accreditation Application.

Review

Only complete applications, including the submission of all required supporting documents and payment of applicable fees, will be reviewed. The review will be completed within 14 business days, subject to the volume of submissions.

Upon completion of the review for accreditation, FP Canada will email the results of the assessment to the Responsible Person(s). Two outcomes are possible:

Accredited

If FP Canada determines that all requirements have been satisfactorily met, it will approve the application. The accreditation will be effective for a three-year period from the date accreditation is granted.

Not Accredited

If FP Canada determines that all criteria have not been satisfactorily met, FP Canada will advise the education provider of the deficiencies and will work with them to identify the changes required for reconsideration.

Program Fees

Application

Education providers are required to pay a non-refundable fee at the time of submission for the application review and accreditation (“Accreditation Fee”). The Accreditation Fee is \$500 (plus applicable taxes⁴).

Faculty Access

Once accredited, education providers are required to pay a non-refundable fee for online access to the Professional Education Content for a period of three years (“Faculty Access Fee”). The Faculty Access Fee is \$1,500 (plus applicable taxes) for access for up to four Faculty members.

Student Access

Once accredited, education providers are required to pay a fee for student access to the Professional Education Content for each enrolled student (“Student Access Fee”) and are invoiced by FP Canada two weeks from the start date of FP Canada-accredited Professional Education. The Student Access Fee is \$350/student (plus applicable taxes) and is calculated based on the number of students enrolled (e.g., for 15 students, the Student Access Fee would be \$5,250, plus applicable taxes).

Payments can be made by cheque payable to FP Canada or electronic funds transfer (EFT) payment. If you have any questions about payments, please contact education@fpcanada.ca.

⁴Taxes: %5 GST in AB, MB, NT, NU, PE, QC, SK, YT; 12% HST in ON, NB, NL; 15% HST in NS

FP Canada-Accredited Professional Education Providers

Onboarding Process for Education Providers

Once Professional Education Accreditation for CFP Certification is granted by FP Canada, FP Canada will schedule an initial onboarding meeting with the education provider in order to provide:

1. Training and access to the Professional Education Content through the learning platform (see [Learning Platform Information](#));
2. Overview of Marks Use guidelines for education providers and training on how to leverage the FP Canada content and resources available to help promote their program/course; and
3. Identifying opportunities for FP Canada participation in student and career events to highlight opportunities for a career in financial planning.

The initial meeting must include the Faculty as well as the representative(s) from the group responsible for updating the program information on the website and communicating about the program to students and prospective students.

Learning Platform Information and Education Delivery

Education providers who have received accreditation will be provided with all relevant course pages and Professional Education Content, accessible through the learning platform (D2L Brightspace). Education Providers will have the ability to brand their course pages and make approved adjustments on the learning platform to reflect the details of their FP Canada-accredited Professional Education.

The Professional Education Content may be delivered in its entirety through one university or college level course. The course can be delivered entirely online or in a hybrid format, supplemented with live sessions or lectures.

FP Canada-accredited Professional Education providers are fully responsible for the logistics of live classes, whether in-person or virtual, however FP Canada will provide ongoing learning platform support and guidance.

Course Updates and Renewal of Accreditation

Education providers must immediately advise FP Canada of any changes to their FP Canada-accredited Professional Education, including changes to Faculty, course outline, or any other information provided in the initial Accreditation Application.

FP Canada will request that all FP Canada-accredited Professional Education providers complete an Annual Update Form, included as [Appendix C](#), for confirmation that the education provider continues to meet the requirements for accreditation. FP Canada will provide six months' notice to the education provider of the approaching expiration of their accreditation. In order to maintain accreditation, education providers must reapply every three years.

Appendix A: CFP Professional Education Program

Learning Objectives

There are seven units of learning covered in the CFP Professional Education Program, each of which represents a stage in a financial planning engagement. Upon completion of the unit, students should be able to:

Unit 1: Value Proposition

- Describe the purpose and components of a value proposition
- Prepare personalized questions, using the planning template, to help identify a client's jobs, pains, and gains
- Describe strategies to gather information from a client
- Determine a client's jobs, pains, and gains
- Explain how a financial planner adds value through the 3Hs
- Develop a value proposition statement outlining a holistic financial planning approach to a client's circumstances
- Demonstrate appropriate strategies for managing ethical issues that may surface during the value proposition phase
- Solve common problems that surface during the value proposition phase using strategies influenced by human behaviour concepts

Unit 2: Terms of Engagement

- Describe the purpose of the terms of engagement in the financial planning process
- Explain the required and optional disclosures of a terms of engagement document
- Use the terms of engagement tool to create a personalized terms of engagement document for a client
- Present the terms of engagement to set clear expectations and increase a client's trust in the financial planning process
- Demonstrate appropriate strategies for managing ethical issues that may surface during the terms of engagement phase
- Solve common problems that surface during the terms of engagement phase using strategies influenced by human behaviour concepts

Unit 3: Discovery

- Describe the purpose and steps of the discovery process
- Explain the importance of the 5W-1H questions when preparing qualitative questions

- Develop qualitative questions, using the Base Questions tool, personalized to a client's circumstances
- Identify strategies to optimize the collection of quantitative data
- Explain how the Financial Discovery Register supports the collection of quantitative data
- Identify a client's key findings, gaps, and red flags
- Select potential financial planning options to test with a client
- Conduct a client-centered discovery to gather the most relevant qualitative and quantitative information
- Conclude the discovery process by finalizing all relevant items (outstanding information, estimates, terms of engagement updates, notes)
- Demonstrate appropriate strategies for managing ethical issues that may surface during the discovery phase
- Solve common problems that surface during the discovery phase using strategies influenced by human behaviour concepts

Unit 4: Analysis

- Describe the purpose and steps of the analysis phase
- Select appropriate assessment models based on a client's jobs, pains, gains, and terms of engagement
- Determine client issues and opportunities using the assessment models provided
- Develop financial planning strategies based on a client's issues and opportunities
- Determine the feasibility of potential strategies by analyzing quantitative and qualitative data
- Determine what trade-offs may be needed to best implement multiple strategies
- Select the best financial planning strategies for a client
- Demonstrate appropriate strategies for managing ethical issues that may surface during the analysis phase
- Solve common problems that surface during the analysis phase using strategies influenced by human behaviour concepts

Unit 5: Recommendations and Plan

- Describe the purpose and elements of an effective recommendation
- Write a financial plan using client-friendly language that:
 - Summarizes the client's goals, needs, personal information, assumptions, and plan recommendations
 - Provides a description of the approach for each financial planning area that:
 - Summarizes the client's current situation

- Identifies issues and opportunities
- Outlines evaluated strategies
- Makes a recommendation for each of the financial planning areas that:
 - Aligns with a client's goals
 - Describes associated risks and costs
 - Lists third-party professionals required
 - Defines time sensitivities
- Outlines how recommendations may impact other financial planning strategies
- Describes an action plan for implementation
- Includes appendices (supporting materials)
- Prepare responses to potential client questions and objections
- Deliver a client's recommended financial plan through a concise and personalized presentation
- Demonstrate appropriate strategies for managing ethical issues that may surface during the recommendation phase
- Solve common problems that surface during the recommendation phase using strategies influenced by human behaviour concepts

Unit 6: Implement Recommendations

- Explain the factors that influence the planner's role during implementation
- Explain how to obtain a client's input on plan implementation
- Make appropriate referrals to third-party professionals that:
 - Align with a client's best interests
 - Frame the referral as a planner-provided benefit
 - Outline the fees associated, including any incentives the planner may receive
 - Disclose conflicts of interest
 - Explain how you will follow up
- Develop strategies for implementing the client's financial plan recommendations, as guided by the terms of engagement
- Demonstrate appropriate strategies for managing ethical issues that may surface during the implementation phase
- Solve common problems that surface during the implementation phase using strategies influenced by human behaviour concepts

Unit 7: Monitor and Review

- Describe how financial plan reviews positively impact the financial planning process
- Explain how the terms of engagement dictate the financial planner's role in the monitor and review process
- Identify the factors that signal the need for a plan review
- Create a plan that lays out the frequency and scope of future financial plan reviews
- Develop a strategy for monitoring and reviewing the implementation of the plan
- Demonstrate appropriate strategies for managing ethical issues that may surface during the monitor and review phase
- Solve common problems that surface during the monitor and review phase using strategies influenced by human behaviour concepts

Appendix B: Completing the Accreditation Application

1. Education Provider Information

FP Canada requires relevant information on the education provider applying for accreditation, name and address and URL of the academic institution, as well information on the program and/or course contact. The “Responsible Person” refers to the individual(s) responsible for ensuring that FP Canada’s Accreditation Criteria are met and with the authority to bind the education provider in an agreement.

2. Program & Course Information

FP Canada requires relevant information on the degree program and course for which the Professional Education is a part of, including course code, course name, start/date/end date, passing grade and course description as it appears in the course calendar and on the website. In addition, FP Canada requires information on all pre-requisites required for course enrolment.

3. Faculty

As per FP Canada’s Guidelines, the Faculty must meet FP Canada’s Faculty Requirements. “Faculty” is defined to include all individuals teaching or supporting students in FP Canada-accredited Professional Education, including fulltime faculty, part-time faculty, volunteers, contract markers, and teaching assistants. FP Canada requires the names of each Faculty member and their credentials, background and education, as well as their years of qualifying financial planning experience⁵. FP Canada requires that Faculty CVs be submitted along with the Accreditation Application for review.

4. Supplemental Course Assignments and Assessments

FP Canada requires information on any assignments or assessments that have been added to supplement the Professional Education Content.

5. Academic Honesty and Integrity

FP Canada requires that formalized academic honesty and integrity policies and systems be in place to address student misconduct, including, but not limited to, cheating on assignments or assessments, plagiarism, and the falsification of academic documents or records. This information may be provided in the form of a summary of policies and procedures in place and/or a link to official documents or policies.

To protect the integrity of the FP Canada Institute’s education programs and FP Canada certifications, we strongly encourage education providers who deliver FP Canada-accredited

⁵ Qualifying work experience is based on a 35-hour work week and is defined as full-time (or equivalent part-time) financial planning related employment or self-employment. Experience must be client-facing and involve the application of the knowledge, skills and abilities described in the FP Canada Standards Council Competency Profile.

Professional Education to enter into a formal agreement with FP Canada to report findings of academic misconduct.

6. Textbooks and Resources

Indicate any textbooks, articles, cases and other resource materials used in the FP Canada-accredited Professional Education.

7. Terms and Conditions of Accreditation

FP Canada requires the “Responsible Person(s)” to read and agree to adhere to the Terms and Conditions of Accreditation within the Accreditation Application, the Guidelines and all other FP Canada policies.

Appendix C: Annual Update Form

PROFESSIONAL EDUCATION ACCREDITATION FOR CFP CERTIFICATION

Annual Update Form

Institution Name:

Program Name:

Course Name:

Accreditation Period:

Responsible Person(s):

FP Canada-accredited Professional Education Information

Course Details	Change (Yes/No)
Program Name	
Course Name	
Course Code	
Course Outline	
Course Description	
Pre-requisite Courses	
Course Textbook or Resources	
Pass Grade	
Responsible Person(s)	

In the space below, please provide a detailed explanation of any changes identified above. If there are changes to the course outline, please also email the new course outline separately.

Confirmation of Faculty

Please provide current Faculty members in the table below, along with their credentials, background, education, and years of qualifying financial planning experience.

Faculty Member Name	Credentials, Background & Education	Years of Qualifying Financial Planning Experience
1.		
2.		
3.		
4.		

Other Changes

If there are any other upcoming changes to your program and/or course that may impact your FP Canada accreditation, please provide details of these changes in the space below.

Confirmation and Attestation

I hereby certify that I have reviewed all sections of this Annual Update Form and that all answers given are true and correct. I further certify that our academic institution and its FP Canada-accredited Professional Education continues to meet the requirements set out in the Guidelines and all terms and conditions of the FP Canada Professional Education Accreditation Program for CFP Certification.

Responsible Person (signature): _____

Date:



Contact Details

FP CANADA

902-375 University Avenue, Toronto, Ontario M5G 2J5

416.593.8587 | 1.800.305.9886 | fpcanada.ca

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