

# FP Canada Exemption Application

Here is a summary of the exemptions available:

## PFP

- Candidates may apply for an exemption from an FP Canada-Approved Core Curriculum education program and FPSC Level 1<sup>®</sup> Examination in Financial Planning and proceed directly to an FP Canada-Approved Capstone Course which will qualify candidates to write the CFP<sup>®</sup> examination. Once the exemption is approved, these candidates may also apply to become an FPSC Level 1 Certificant in Financial Planning.

## Pl. Fin. or CFP credential from an FPSB Member in another territory

- Candidates may apply for an exemption from an FP Canada-Approved Core Curriculum education program, FPSC Level 1 examination and an FP Canada-Approved Capstone Course and may apply to proceed directly to the CFP examination. Once the exemption is approved, these candidates may also apply to become an FPSC Level 1 Certificant in Financial Planning.

## CPA, CFA, CLU, Fellow of the Canadian Institute of Actuaries (FCIA), Lawyer and Quebec Notary

- Candidates may apply for an exemption from an FP Canada-Approved Core Curriculum education program and may apply to proceed directly to the FPSC Level 1 examination. Those individuals who have a minimum of five years of qualifying, client facing financial planning work experience will be requested to submit further documentation for exemption from the FPSC Level 1 examination and proceed directly to an FP Canada Approved Capstone Course.

**All candidates applying for exemptions must provide attestation from their governing professional body confirming their qualifications and good standing.**

## Important Changes to CFP<sup>®</sup> Certification Requirements – Effective January 1, 2020

New paths to CFP<sup>®</sup> certification

- New [streamlined paths to certification](#) for individuals who hold relevant financial planning or other relevant professional qualifications. Further, candidates who hold certain designations and licenses will be granted [exemptions from components of FP Canada's Core Curriculum and Advanced Curriculum requirements](#).
- Candidates pursuing CFP certification will no longer be required to write the FPSC Level 1 (or QAFP) examination as a prerequisite to registering for the CFP examination.
- The Capstone course will be accepted as a pre-requisite for the June and November 2019 CFP examinations. First-time writers of the June 2020 CFP examination will complete the Introduction to Professional Ethics (IPE) course and the CFP Professional Education Program.
- Repeat writers of the CFP examination in June 2020 and beyond will continue to qualify with their Capstone course subject to education currency and exam attempt limits, provided they complete the new Introduction to Professional Ethics course.

For more information, visit [www.fpcanada.ca/students-and-candidates](http://www.fpcanada.ca/students-and-candidates)

## How to Submit Your Application

Please scan and email a completed version of this form with your supporting documents to [info@fpcanada.ca](mailto:info@fpcanada.ca). Alternatively, you may fax a completed version of this form with your supporting documents to 416.593.7412. Completed applications will take approximately 1-2 business days to be processed. You will be notified via email about the status of your application.

## We're Here to Help

If you have any questions about this form, your exemption application or your next steps on the path to certification, please contact FP Canada Stakeholder Support at [info@fpcanada.ca](mailto:info@fpcanada.ca), 416.593.8587 or 1.800.305.9886. We're here from Monday to Friday, 9:00 a.m. to 5:00 p.m. ET.

## PART A | Personal Information (please print)

Name
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Check here if you do not have a business address.

Business Name			
Job Title			
Suite	Business Address (street number and name)		
City	Province	Postal Code	Country
Phone ( )	Ext.	Fax	
Business Email		Toll Free	Ext.

Suite	Residential Address (street number and name)		
City	Province	Postal Code	Country
Phone ( )	Fax		
Home/Personal Email			

Preferred contact information:  Business  Residence

From time to time FP Canada will use your preferred contact information to communicate with you. Please visit online. [fpcanada.ca](http://fpcanada.ca) to update your contact details, or notify FP Canada promptly, in writing, of any changes (including your email address, mailing address, telephone and fax numbers).

## Part B | Payment

<b>2019 Exemption Fee</b>	<b>AB, BC, MB, NT, NU, QC, SK, YT</b>	<b>ON</b>	<b>PE</b>	<b>NB, NL, NS</b>
	<b>\$288.75</b> (\$275 + 5% GST)	<b>\$310.75</b> (\$275 + 13% HST)	<b>\$313.50</b> (\$275 + 14% HST)	<b>\$316.25</b> (\$275 + 15% HST)

### Method of Payment (select one)

\* FP Canada currently does not accept American Express

- Money Order
- Cheque (payable to FP Canada)
- VISA
- MasterCard

### Credit card information (Please print card number clearly)

Card Number

               

Expiry Date (MM/YY)

  /  

Name on Credit Card (Please print clearly)

Signature

Date

Business# 894829878RT