



FP Canada[®]

*Advancing Professional
Financial Planning*

FP Canada[™] Continuing Education Accreditation Program Manual

Effective February 15, 2025



QAFP[®]

Continuing Education Accreditation Program Manual

TABLE OF CONTENTS

Introduction	1
FP Canada	1
CFP® Professionals	1
QAFP® Professionals	1
FP Canada Continuing Education	1
CE Requirements for FP Canada Certificants	2
Annual CE Requirements.....	2
Qualifying CE	5
Financial Planning CE	5
Professional Responsibility CE.....	5
General CE and Giving Back	6
FP Canada CE Accreditation Process	6
Applying for Accreditation of CE Activities.....	6
Types of CE Accreditation Available from FP Canada	6
Content Development and Presentation Requirements.....	7
Verification of CE Completion	7
CE Application Requirements.....	7
Accreditation Review Process	8
Payment.....	8
Renewing CE Activities.....	9
CE Renewal Process	9
Appendix A – Qualifying FP Canada CE Categories	10
Professional Responsibility.....	11
General CE	12
Appendix B – CE Activity Application Process	13
Step 1: Create an FP Canada CE Provider Portal Account.....	13
Step 2: Submit Your CE Activities to the FP Canada CE Accreditation Program	13
Step 3: Application Attestations	15
Step 4: Complete Order	15
Step 5: Review Your Order(s)	16
Appendix C – Requirements for Using the Accredited CE Logo	17
Process for Using the Accredited CE Logo	17
Requirements for Using the Accredited CE Logo.....	17

INTRODUCTION

FP Canada

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 in Canada. FP Canada's two certifications, QUALIFIED ASSOCIATE FINANCIAL PLANNER™ certification and CERTIFIED FINANCIAL PLANNER® certification, set high standards for financial planners.

CFP® Professionals

CERTIFIED FINANCIAL PLANNER certification is the most widely recognized financial planning designation in Canada and throughout the world and is considered the gold standard for the profession. CFP® professionals have demonstrated the knowledge, skills, experience, and ethics to provide holistic financial planning strategies and solutions at the highest level of complexity required of the profession, and work with their clients to build a financial plan so that they can Live Life Confidently™.

CFP professionals across Canada are part of an international network of 27 territories around the world. CFP certification has been approved by the Financial Services Regulatory Authority of Ontario as a valid credential for individuals using the Financial Planner title in Ontario.

QAFP® Professionals

QUALIFIED ASSOCIATE FINANCIAL PLANNER certification demonstrates a financial planner's competence and commitment to high ethical standards including putting their clients' interests first. Certification demonstrates professionals have the 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 has been approved by the Financial Services Regulatory Authority of Ontario as a valid credential for individuals using the Financial Planner title in Ontario.

FP Canada Continuing Education

To maintain certification, financial planning professionals certified by FP Canada are required to meet Continuing Education (CE) requirements as set out in the [QAFP® Certification Policies](#) and [CFP® Certification Policies](#).

FP Canada's CE requirements go beyond ensuring financial planners maintain their technical competence. They are designed to support the maintenance and ongoing professional development required of professionals to continue meeting their client needs.

This Program Manual outlines the CE requirements for the financial planning professionals certified by FP Canada, as set out in the [Continuing Education Accreditation Policy](#), the CFP Certification Policies and the QAFP Certification Policies, and the processes by which FP Canada reviews, approves, and accredits continuing education activities.

CE REQUIREMENTS FOR FP CANADA CERTIFICANTS

Annual CE Requirements

To ensure that their knowledge and competencies remain current and continue to expand, both CFP professionals and QAFP professionals are required to complete CE activities each year. FP Canada's CE requirements encompass the categories of Financial Planning, including Professional Skills; Professional Responsibility; and General CE, including Giving Back.

CE credits must be accumulated on a calendar-year basis, from January 1 to December 31.

In general, one hour of qualifying activity is equal to one CE credit. A full day of education activity may qualify for a maximum of eight CE credits.

A portion of those CFP professionals and QAFP professionals subject to audit are randomly selected for audit each year and must provide official documentation of their CE activities to allow FP Canada to verify their successful completion of CE requirements.

Full details regarding CE requirements for CFP professionals and QAFP professionals are available in the [QAFP® Certification Policies](#) and [CFP® Certification Policies](#).

CFP PROFESSIONALS

To renew certification, CFP professionals must complete 25 hours of CE credits annually, including two hours of CE accredited by FP Canada in the category of Professional Responsibility and 12 hours of CE accredited by FP Canada in the category of Financial Planning, as outlined in the table below.

CFP professionals may also claim up to 11 CE credits in the category of General CE including up to five CE credits in the category of Giving Back.

TWENTY-FIVE (25) ANNUAL CREDITS REQUIRED (JANUARY 1 TO DECEMBER 31)			
Breakdown by Category	Minimum Required Credits Annually	Maximum Claimable Credits Annually	Carry-Over Permitted to Next Calendar Year
Financial Planning including Professional Skills	12 ¹	Unlimited	23
Professional Responsibility	2	Unlimited	No ²
General CE including Giving Back	No minimum	11 ³	No

¹ Effective January 2025, CFP professionals must complete 12 credit hours (formerly 10) in the category of Financial Planning annually, and the sub-category of Professional Skills was added as a new CE category under Financial Planning.

² Effective January 2025, Professional Responsibility CE activities must be pre-accredited by FP Canada prior to being offered. If more than two credit hours in the category of Professional Responsibility are completed in a given year, the additional credit(s) may be applied under the Financial Planning category.

³ A maximum of five credit hours may be claimed in the sub-category of Giving Back on an annual basis. CE which previously qualified in the categories of Product Knowledge and Practice Management may qualify in the category of General CE.

QAFP PROFESSIONALS

To renew certification, QAFP professionals must complete 12 hours of CE credits annually, including at least one hour of CE accredited by FP Canada in the category of Professional Responsibility and seven hours of CE accredited by FP Canada in the category of Financial Planning, as outlined in the table below.

QAFP professionals may also claim up to four CE credits in the category of General CE including CE credits in the category of Giving Back.

TWELVE (12) ANNUAL CREDITS REQUIRED (JANUARY 1 TO DECEMBER 31)			
Breakdown by Category	Minimum Required Credits Annually	Maximum Claimable Credits Annually	Carry-Over Permitted to Next Calendar Year
Financial Planning including Professional Skills	7 ¹	Unlimited	11
Professional Responsibility	1	Unlimited	No ²
General CE including Giving Back	No minimum	4	No

¹ Effective January 2025, the sub-category of Professional Skills was added as a new CE category under Financial Planning.

² Effective January 2025, Professional Responsibility CE activities must be pre-accredited by FP Canada prior to being offered. If more than one credit hour in the category of Professional Responsibility is completed in a given year, the additional credit(s) may be applied under the Financial Planning category.

QUALIFYING CE

Detailed descriptions for each CE category are available in [Appendix A](#).

Financial Planning CE

CE in this category must be accredited by FP Canada.

CE in the category of Financial Planning must relate to one or more aspects of the [FP Canada Standards Council Competency Profile for QAFP Certification](#) or the [FP Canada Standards Council Competency Profile for CFP Certification](#). The Competency Profiles encompass, among other things, the six fundamental financial planning areas, technical knowledge related to Human Behaviour as set out in the [FP Canada Body of Knowledge](#), and Professional Skills.

Professional Skills are a foundational element of applying financial planning competencies. They refer to the non-technical competencies expected of members of a profession and outline how QAFP professionals and CFP professionals are expected to behave and interact with clients and others, including the practical application of technical knowledge in respect of human behaviour, and are inherent to being a competent financial planning professional.

CE focused on diversity, equity, and inclusion will also qualify for accreditation in the category of Financial Planning.

Professional Responsibility CE

CE in this category must be pre-accredited by FP Canada. This means the activity has been reviewed and accredited by FP Canada in advance of the activity offering. Post-delivery accreditation of Professional Responsibility CE credits is not available.

CE in the Professional Responsibility category must be directly related to the professional responsibility expectations of CFP professionals and QAFP professionals, as set out in the [FP Canada Standards Council Standards of Professional Responsibility](#).

CE in this category must demonstrate the application of the Standards of Professional Responsibility, such as through the use of examples, case studies, and assessment items that are relevant to the professional practice of financial planning.

Professional Responsibility CE activities that have not been reviewed and accredited by FP Canada in advance of the activity offering will not satisfy FP Canada's Professional Responsibility CE requirement. A CE activity that has not been pre-accredited by FP Canada as a Professional Responsibility CE activity may be accredited in the category of Financial Planning, including Professional Skills, if the activity meets the accreditation requirements.

General CE and Giving Back

CE in the General CE category, excluding the Giving Back category, may be submitted to FP Canada for accreditation but does not need to be accredited by FP Canada to meet FP Canada's requirements. Accreditation may be sought for CE in the General CE category to provide greater certainty with respect to its suitability in meeting Certificants' ongoing CE obligations.

CE which was accredited in the former CE categories of Practice Management or Product Knowledge may now be categorized and accredited as General CE. **Practice Management** relates to the knowledge and skills used in building professional relationships and growing a professional practice and includes activities focused on business planning, business development, networking or sales skills. **Product Knowledge** relates to knowledge of specific financial services products.

FP Canada does not offer accreditation of CE activities in the Giving Back category.

Certificants may claim credits in the category of Giving Back for pro bono financial planning activities and/or volunteering with FP Canada, community organizations, industry associations, or charitable groups that help Canadians understand the importance of financial planning. For details regarding qualifying activities refer to the [QAFP Certification Policies](#) and [CFP Certification Policies](#).

FP CANADA CE ACCREDITATION PROCESS

Applying for Accreditation of CE Activities

The accreditation process for CE providers is managed by FP Canada through the use of an online portal, accessed from the FP Canada website.

In order to have CE activities accredited by FP Canada, a prospective CE provider must first create an account for the FP Canada CE Provider Portal. The account creation process is outlined in [Appendix B](#).

The FP Canada CE Provider Portal is the source for all information regarding the status of an application for CE activity accreditation. CE providers may also use the CE Provider Portal to modify or add activities, view payment history, and update information about their organization.

Types of CE Accreditation Available from FP Canada

In addition to accrediting CE for FP Canada certificants, FP Canada has been recognized by the Canadian Investment Regulatory Organization (CIRO) as a Third-Party Accreditor for the Mutual Fund Dealer (MFD) Continuing Education (CE) Program (MFD CE).

CE providers may apply to have CE activities accredited:

- for FP Canada CE requirements,
- for both FP Canada and the MFD CE requirements, or
- for MFD CE requirements only.

The accreditation period for a CE activity accredited by FP Canada is one year.

In accordance with the policies set by CIRO for the MFD CE program, MFD accreditation is valid for two years.

If a CE activity is accredited by FP Canada as meeting the standards established under the MFD CE Program, CE providers must then register the program separately with the MFD, and a separate fee is required by the MFD.

For further guidance and information on the MFD Accreditation Standards, refer to the [Mutual Fund Dealer \(MFD\) Continuing Education \(CE\) Program](#) website.

Content Development and Presentation Requirements

Accredited CE activities must relate to one or more of the CE categories identified in the [Qualifying CE](#) section and detailed in [Appendix A](#). For more information on content development and presentation requirements, refer to the [Continuing Education Accreditation Policy](#).

Verification of CE Completion

When requested by FP Canada, the organization providing accredited CE must verify attendance or completion of the activity by a specific FP Canada certificant. Information regarding how CE providers can provide a means to verify the successful completion of accredited CE activities is available in the Continuing Education Accreditation Policy.

CE Application Requirements

For each CE activity for which FP Canada and/or MFD CE accreditation is sought, the following information must be provided:

- Title and descriptions of the CE activity;
- Delivery format (e.g., in person, online, hybrid);
- Activity format (e.g., seminar, conference, webinar; in-house training; or self-study/online course with an assessment);
- Activity dates and location, where applicable;
- Language (English, French, or both);
- Website URL, if applicable;
- CE credit category(ies) in which accreditation is sought;
- Activity length (in hours and minutes);
- Activity price, if applicable;
- Learning objectives and/or a training plan for the CE activity;
- Supporting documentation that evidences how the stated learning objectives will be fulfilled and/or how the training will be delivered to participants. Such documentation may include course, program, or seminar outlines or instructional content; assessment items (where applicable), and/or video or webinar recordings;
- Information outlining how attendance will be confirmed and how completion of the CE activity by individual attendees is recorded; and
- The name(s), qualifications, and experience of the individual(s) developing and/or delivering the CE activity.

A complete application includes all necessary information for FP Canada to determine if an activity is eligible for accreditation, and the appropriate number of CE credit hours and the applicable CE credit category(ies). FP Canada will not review an application for CE activity accreditation until all required information and documentation is provided.

Accreditation Review Process

The CE activity accreditation review process will begin once all required information and documentation has been provided and payment has been received.

FP Canada will review the application to ensure that the accreditation application meets the CE Application Requirements.

The FP Canada review will typically be completed within 15 business days of receiving the complete application. Any delay in the process beyond the 15-day window will be communicated via email.

More information regarding the FP Canada accreditation review process, the accreditation period, and accreditation decisions is available in the Continuing Education Accreditation Policy.

Accreditation Decisions

If a CE provider disagrees with an FP Canada accreditation decision, the provider may submit a written request, along with any new supporting materials, to have the application reviewed a second time. The request, as well as any supporting materials must be received by FP Canada within ten business days of the initial review decision.

The second review will typically be completed within five business days once the written request is received by FP Canada. Any delay in the process beyond the five-day window will be communicated via email.

Payment

Payments are made online during the application process. Information on accreditation fees is available in the Continuing Education Accreditation Policy.

For more information on making a payment, review [Appendix B](#).

If, upon review, a CE activity submitted for accreditation does not qualify for accreditation, FP Canada will reimburse the fees charged in excess of one credit hour. If the activity is accredited for fewer credits than requested on the application, FP Canada will refund the difference in fees in excess of one credit hour.

RENEWING CE ACTIVITIES

CE Renewal Process

To apply for the renewal of the accreditation of a CE activity, CE providers may log in to the FP Canada CE Provider Portal and submit an application for the re-accreditation for their CE activity, along with the appropriate CE credit accreditation fee.

APPENDIX A – QUALIFYING FP CANADA CE CATEGORIES

CE requirements include the categories of Financial Planning, including Professional Skills; Professional Responsibility; and General CE, including Giving Back.

Financial Planning

CE in the category of Financial Planning must relate to one or more aspects of the [FP Canada Standards Council Competency Profile for QAFP Certification](#) or the [FP Canada Standards Council Competency Profile for CFP Certification](#). The Competency Profiles encompass, among other things, the six fundamental financial planning areas, technical knowledge related to Human Behaviour as set out in the [FP Canada Body of Knowledge](#), and Professional Skills.

Professional Skills

Professional Skills are a foundational element of applying financial planning competencies. They refer to the non-technical competencies expected of members of a profession and outline how QAFP professionals and CFP professionals are expected to behave and interact with clients and others, including the practical application of technical knowledge in respect of human behaviour, and are inherent to being a competent financial planning professional.

CE focused on diversity, equity, and inclusion will also qualify for accreditation in the category of Financial Planning.

Financial Management

Financial management focuses on clients' current and future financial positions, including the use of cash flow and the development of cash flow statements; the establishment and use of savings; and the use of credit and repayment of debt. A client's financial position is characterized by current and projected cash flow and net worth, and reflects the client's inclination to spend, save and borrow.

Investment Planning

Investment planning focuses on clients' assets and how to best manage them according to clients' investment risk tolerance and objectives. Planning involves all a client's investment holdings, which can include cash, fixed income, equity, real estate and commodity-based assets. Investment planning decisions will impact a client's ability to meet financial goals related to major purchases, as well as education funding, retirement, tax and estate planning.

Insurance and Risk Management

Insurance and risk management focus on strategies designed to manage clients' exposure to an unexpected financial loss due to death, disability, health issues, property damage and other risks. CFP professionals and QAFP professionals compare a client's risk exposure to their current insurance coverage and other available assets to help determine and prioritize their risk management needs.

Tax Planning

Tax planning focuses on clients' current and future income tax obligations, and the use of available strategies to minimize or defer taxation. Tax planning strategies are designed to help strengthen a client's financial position, giving them a better opportunity to meet their financial goals.

Retirement Planning

Retirement planning focuses on clients' financial well-being after their regular employment has stopped. It involves a comparison of a client's expected lifestyle in retirement to their projected retirement income stream and assets.

Estate Planning and Law for Financial Planning

Estate planning focuses on the distribution of assets on death. Administering an estate involves the payment of funeral expenses, debts, taxes and other financial obligations of the deceased, and the distribution of assets to beneficiaries. CFP professionals and QAFP professionals discuss estate planning objectives with their clients, project their net worth at death, determine any constraints or opportunities to achieve clients' objectives, and develop strategies and recommendations to help meet them.

The legal aspects that impact clients' financial planning include the obligations or entitlements detailed in domestic, separation or divorce agreements; trust deeds; shareholder or partnership agreements; and the provisions outlined in powers of attorney or mandates and health care directives.

Human Behaviour

The assessment of knowledge related to how the brain works and makes decisions, including the values, heuristics, emotions and disorders related to money that an individual may bring to the decision-making process. Professionals should understand the stages of individual change and what may motivate or inhibit an individual in making change. They should also understand how their actions and communications may garner or hinder trust.

Professional Responsibility

Effective January 2025, CE in this category must be pre-accredited by FP Canada. This means the activity has been reviewed and accredited by FP Canada in advance of the activity offering. Post-delivery accreditation of Professional Responsibility CE credits is not available.

CE in the Professional Responsibility category must be directly related to the professional responsibility expectations of CFP professionals and QAFP professionals, as set out in the [FP Canada Standards Council Standards of Professional Responsibility](#).

CE in this category must demonstrate the application of the Standards of Professional Responsibility, such as through the use of examples, case studies, and assessment items that are relevant to the professional practice of financial planning.

Professional Responsibility CE activities that have not been reviewed and accredited by FP Canada in advance of the activity offering will not satisfy FP Canada's Professional Responsibility CE requirement. A CE activity that has not been pre-accredited by FP Canada as a Professional Responsibility CE activity may be accredited in the category of Financial Planning, including Professional Skills, if the activity meets the accreditation requirements.

General CE

CE in the General CE category, excluding the Giving Back category, may be submitted to FP Canada for accreditation but does not need to be accredited by FP Canada to meet FP Canada's requirements. Accreditation may be sought for CE in the General CE category to provide greater certainty with respect to its suitability in meeting Certificants' ongoing CE obligations.

CE which was accredited in the former CE categories of Practice Management or Product Knowledge may now be categorized and accredited as General CE.

Practice Management

Qualifying CE includes the knowledge and skills used in growing and maintaining a professional practice. CE in this category may include activities focused on the financial planning process development, business planning, and business development.

Product Knowledge

Qualifying CE includes the product knowledge that planners may use to advise on and sell products or comment on products held by their clients. CE in this category may be focused on any financial planning product, including investment, insurance, or debt. CE should present a balanced view of the product that includes features and benefits as well as client suitability, risks, and costs. The content of CE should help certificants make product recommendations based on the fit of the product with their client's situation rather than on the product's returns.

FP Canada does not offer accreditation of CE activities in the Giving Back category.

Certificants may claim credits in the category of Giving Back for pro bono financial planning activities and/or volunteering with FP Canada, community organizations, industry associations, or charitable groups that help Canadians understand the importance of financial planning. For details regarding qualifying activities refer to the [QAFP Certification Policies](#) and [CFP Certification Policies](#).

APPENDIX B – CE ACTIVITY APPLICATION PROCESS

Step 1: Create an FP Canada CE Provider Portal Account

In order to submit CE activities for the FP Canada CE Accreditation Program, CE providers must first create an account for the FP Canada CE Provider Portal. Visit the FP Canada CE Provider Portal and click on “Become a CE Provider.”

Organization Information

Complete your information. All fields are mandatory except for “Upload Logo.” However, we encourage you to upload your organization’s logo, as it will be displayed next to your CE activities (once accredited) on the FP Canada Accredited CE Search Tool.

Contact Information

Complete your contact information. All fields are mandatory. If you wish to update the contact details for your organization in the future, you may do so by logging into your FP Canada CE Provider Portal and clicking “Edit your CE provider profile.”

Step 2: Submit Your CE Activities to the FP Canada CE Accreditation Program

Login to the [FP Canada CE Provider Portal](#).

You may select “Add a new CE activity” to start a new application. You may also update an application that you have previously submitted by selecting “View or update your current CE activities.”

1. Introduction

This page provides information about the application process and where to go for assistance with your application.

2. Contact Information

The information that you provided when you created your FP Canada CE Provider Portal account will be auto-populated in the General Information and Business Address sections. Review and confirm this information. All fields are mandatory.

3. Create CE Activities

Click the “Add” button to add CE activities. Please note that the information you provide in this section will be used to populate the FP Canada Accredited CE Search Tool that appears on FP Canada’s public website. We recommend that you include all relevant details to effectively market your CE activities to potential participants and review your information for accuracy before submitting.

Add Activity

Add the CE Activity or Activities that you are submitting for review and accreditation.

Activity Title

Enter the title of the activity as you would like it to appear on the FP Canada Accredited CE Search Tool. If the activity is offered in French, please enter the title in the “French Title” field.

Delivery Method

Select the method of delivery for the activity (i.e. In-Person, Online, or Other) from the dropdown menu. For more information about qualifying delivery methods, please refer to [Appendix A](#).

Activity Format

Select the format of the activity from the drop-down menu (Conference, Credit Course, Inhouse Training, Prep Course, Self-study Course, Seminar, Webinar).

Description

Enter a description of the activity as you would like it to appear on the FP Canada-Accredited CE Search Tool. This is an opportunity to market and promote your activity to all FP Canada certificants across Canada. We recommend that you include all relevant details to effectively market your CE activities to potential participants and review your information for accuracy before submitting.

Credit Categories

Indicate all the credit categories that the activity covers, such as Financial Planning, Professional Responsibility, Practice Management, and/or Product Knowledge. If the Financial Planning category and/or Professional Responsibility categories are selected, indicate the sub-areas that the activity covers. For descriptions of the CE credit categories, please refer to [Appendix A](#). Enter the number of CE credits that your activity qualifies for, excluding time for breaks and lunch. Please enter credit values up to two decimal places and in increments of 0.25 of an hour. For example, if you are submitting three hours and 15 minutes of CE credits for accreditation, enter 3.25.

Activity Details

Click the “Add” button to enter additional details about the activity.

Ongoing Activity or Single Event

Select whether the activity is a single event (i.e. has start and end dates) or if the activity has ongoing registration (i.e. there is no end date). This may be the case for self-study or online activities, as examples.

Do not list this activity on the FP Canada Accredited CE Search Tool

Select this option if you do not wish for your activity to appear on the FP Canada Accredited CE Search Tool.

Start Date

Enter the start date for the activity. The start date may occur in the past if the activity has already occurred or is in progress. This is a mandatory field.

End Date

Enter the end date for the activity or indicate that the activity is ongoing by selecting “Ongoing Activity.” Country, Province, City, Languages Select the country, province, and language(s) from the drop-down menus. Enter the city. These fields are mandatory.

Website

Enter the URL (website address) where an individual can register for or purchase the activity.

Registration Fee

Enter the registration fee for the activity. If there are additional expenses for materials or special pricing considerations, you may wish to indicate this in the Description field of the application. If you enter \$0, it will show as not applicable ('N/A') on the FP Canada Accredited CE Search Tool.

If you have questions about calculating the CE credit accreditation fee, contact CEaccreditation@FPCanada.ca

Step 3: Application Attestations

Check the box to attest that the following disclaimer will be issued in writing or verbally at the beginning of your activity once accreditation has been granted by FP Canada:

[] I confirm that the following disclaimer will be issued in writing or verbally at the beginning of our CE activity once accreditation has been granted by FP Canada:

This CE activity has been accredited by FP Canada as meeting the minimum requirements for CE Accreditation. The views and opinions expressed in this presentation are those of the presenter/content author and do not necessarily reflect the views of FP Canada.

*[] As a provider of FP Canada-Accredited CE Activities, I will abide by and uphold FP Canada's specifications when promoting my organization and CE activities. I will only use the FP Canada-Accredited CE logo, CFP marks and QAFP marks on my materials (e.g. completion certificates, websites, advertisements, and printed materials) according to the rules outlined in the **FP Canada Continuing Education Accreditation Program Manual**.*

Step 4: Complete Order

Once the application has been completed, an option to complete the order by Credit Card Payment:

- Visa
- MasterCard
- American Express

Order Confirmation

Review the status of your payment transaction. You may print this page as your payment receipt. You will also be able to view your payment history online through the FP Canada CE Provider Portal.

Step 5: Review Your Order(s)

The FP Canada CE Provider Portal is used to submit CE activities for accreditation. Through the FP Canada CE Provider Portal, the applicant will be able to:

- easily and conveniently submit CE activities through our online application;
- track the status of CE activities;
- modify CE activity details;
- view payment history; and
- edit the contact information.

APPENDIX C – REQUIREMENTS FOR USING THE ACCREDITED CE LOGO

Process for Using the Accredited CE Logo

Following accreditation of your CE activity, you will be sent the FP Canada Accredited CE logo, which we encourage you to use.

Requirements for Using the Accredited CE Logo

When using the FP Canada Accredited CE logo, you must include the following legal copy. The legal line should appear in that portion of the materials where the logo is used and in as close proximity to the logo as reasonably possible:

CFP[®], Certified Financial Planner[®] and CFP logo are trademarks owned by Financial Planning Standards Board Ltd. (FPSB) and used under license. QAFP[®], Qualified Associate Financial Planner[™], QAFP logo and all other trademarks are those of FP Canada[™]. © 2025 FP Canada[™]. All rights reserved.

The FP Canada Accredited CE logo can be used only to promote FP Canada-accredited CE activities and not to promote the organization.

Correct use



Accredited CE
FP Canada[®]

ABC Financial Inc. wealth management seminar qualifies for 20 FP Canada-accredited CE credits.



Accredited CE
FP Canada[®]

For CFP[®] professionals looking for qualifying CE credits, ABC Financial Inc. wealth management seminar qualifies for 20 FP Canada-accredited CE credits.