




FINANCIAL PLANNING STANDARDS BOARD



Financial Planner Continuing Professional Development Standard

MISSION STATEMENT

Financial Planning Standards Board Ltd. (FPSB) manages, develops and operates certification, education and related programs for financial planning organizations so they may benefit the global community by establishing, upholding and promoting worldwide professional standards in financial planning. FPSB's commitment to excellence is represented by the marks of professional distinction – CFP, CERTIFIED FINANCIAL PLANNER and  CFP.

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FINANCIAL PLANNER CONTINUING PROFESSIONAL DEVELOPMENT STANDARD

Professional development is a process of lifelong learning whereby an individual systematically engages in activities that maintain the abilities, skills and knowledge necessary for professional practice. The commitment of financial planning professionals to continuous development supports acceptance of financial planning as a profession by the communities it serves.

A financial planning professional demonstrates fulfillment of professional development obligations by engaging in learning activities that maintain and develop his or her abilities, skills, knowledge and professional conduct as described in FPSB's:

- Financial Planner Competency Profile;
- Financial Planner Code of Ethics and Professional Responsibility; and
- Financial Planning Practice Standards.

A financial planning professional completes a minimum of 30 hours of continuing professional development every two years, the completion of which is verifiable by the certifying body. At least two of the 30 hours are in FPSB's Financial Planner Code of Ethics and Professional Responsibility and/or Financial Planning Practice Standards.

A financial planning professional maintains a record of his or her continuing professional development and reports hours completed to the certifying body each reporting cycle.



The global symbol
of achievement



The global symbol of excellence
in financial planning

CFP certification is the only globally recognized mark of professionalism for financial planners. When seeking objective, expert and trusted financial planning advice, you should always look for the CFP mark.

To achieve the best financial planning results, call a CFP professional.

For more information on finding a CFP professional near you, visit www.fpsb.org.

CFP Certification *Global excellence in financial planning™*

Financial Planning Standards Board Ltd. owns the CFP, CERTIFIED FINANCIAL PLANNER and CFP Logo marks outside the U.S. and permits qualified individuals to use these marks to indicate that they have met FPSB's initial and ongoing certification requirements.



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