




FINANCIAL PLANNING STANDARDS BOARD



Financial Planner Work Experience Standard

MISSION STATEMENT

Financial Planning Standards Board Ltd. (FPSB) benefits the clients and potential clients of financial planners 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 WORK EXPERIENCE STANDARD

FPSB recognizes the importance of work experience for someone looking to become a financial planning professional to be able to apply financial planning knowledge in diverse or complex client situations. FPSB believes engaging in supervised practice is the most effective method of gaining professional experience, but alternative methods of gaining work experience are acceptable. FPSB expects that the clients of financial planning professionals will benefit from a globally accepted experience standard for financial planning professionals.

Relevant Work Experience

An individual demonstrates relevant work experience, either supervised or unsupervised, working with clients while:

- Engaging in practice described in FPSB's Financial Planning Practice Standards;
- Applying the abilities, skills and knowledge described in FPSB's Financial Planner Competency Profile; and
- Adhering to ethical principles described in FPSB's Financial Planner Code of Ethics and Professional Responsibility.

Supervised Experience

Supervised Experience can be met by completing one year of supervised practice as described above under Relevant Work Experience.

The supervisor, who must be a financial planning professional who has mastered the abilities, skills and knowledge described in FPSB's Financial Planner Competency Profile:

- Provides candidates with experience in, and instruction about, the practice of the profession;
- Helps candidates to develop knowledge about the practice of the profession;
- Teaches candidates the required standards of conduct; and
- Confirms candidates are able to interact with clients.

At the end of the supervised practice period, the supervisor attests to the certifying body in writing to the candidate's readiness to competently and ethically practice financial planning.

Unsupervised Experience

Unsupervised Experience can be met by completing three years of unsupervised practice as described above under Relevant Work Experience.



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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