Information and Resources to Promote
Certified Financial Planner® Certification.



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## How to start the conversation around CFP® Certification

It is important to build a conversation around the profession of financial planning before talking about CFP certification. Students are likely to engage more when they have answers to questions such as:

- Why become a financial planner?

- What do financial planners do?

- What will my future job titles sound like?

- Who employs financial planners?

- Why do I need a professional certification?

We urge you to use the following information and resources to talk about financial planning as a profession as a lead-up to the conversation about CFP certification

Head to: [**Promote Financial Planning as a career**](https://fpcanada.ca/docs/default-source/students/fp-as-a-career-content.docx?sfvrsn=fe39dec8_2)
You can also urge students to head to [www.becomeafinancialplanner.ca](http://www.becomeafinancialplanner.ca) to learn more about the profession of financial planning.

## what is Certified Financial Planner® Certification?

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 in Canada are certified by FP Canada™, a national, not-for-profit professional body working in the public interest. There are about 17,000 CFP professionals across Canada, part of an international network of more than 192,000 in 26 territories around the world. CFP certification has also been approved by the Financial Services Regulatory Authority of Ontario (FSRA) as a valid credential for individuals using the Financial Planner title in Ontario.

Learn more at [www.becomeafinancialplanner.ca](http://www.becomeafinancialplanner.ca)

## Who is FP Canada™ and how do they play a role here?

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 across the country. There are about 17,000 CERTIFIED FINANCIAL PLANNER® professionals and about 1,900 QUALIFIED ASSOCIATE FINANCIAL PLANNER™ professionals as at December 31, 2022, who are held to FP Canada’s rigorous professional and ethical standards. Visit the [FP Canada website](http://www.fpcanada.ca) for more information.

## The impact a CFP® professional can have on the lives of Canadians

People have aspirations – for what and who they care about, for today and for the future. But life is complicated and figuring out how to make those aspirations a reality can be hard. We all need a plan. A financial plan. Only CERTIFIED FINANCIAL PLANNER® professionals see the whole picture, no matter how complex, and work with people to help them understand where they are and where they want to be.

Whether they have a pressing issue or just need some help getting started, CFP® professionals have the knowledge, skills, experience, and the ethics to help people build the financial plan that will let them live their life confidently.

## Why earn a professional certification?

Getting certified is important because it demonstrates that an individual meets stringent proficiency and ethics requirements, including high levels of education and experience.

1. **Knowledge and skills**: Confirms that you have the knowledge, skills, experience, and ethics to provide financial advice

2. **Professional responsibility**: Shows your commitment to the highest ethical standards

3. **Professional brand**: Demonstrates your value to employers and clients

4. **Regulatory requirements**: Ensures that you keep pace with evolving legal and regulatory requirements

5. **Trust:** Fosters trust in the advice Canadians receive from you

In recent years, provincial governments in Ontario and Saskatchewan have passed laws requiring financial planners in those provinces to demonstrate their competence and professionalism by obtaining a financial planning certification. CFP® certification has been approved by the Financial Services Regulatory Authority of Ontario (FSRA) for use of the financial planner title in Ontario We look forward to other provinces implementing similar harmonized requirements in the future.

## Wonder what a day in the life of a CFP professional might look like?

You can learn more about CFP professionals through FP Canada’s [Day-in-the-life series](https://www.fpcanada.ca/become-a-financial-planner/what-financial-planners-do#DITL).
FP Canada reached out to professional financial planners with the intent of bringing their stories to future professionals (such as yourselves). These stories will not only provide a sneak peek into the lives of these successful professionals but can also help you understand the key personality traits that lead to success in the profession of financial planning.

Learn more at <https://www.fpcanada.ca/become-a-financial-planner/what-financial-planners-do#DITL>

## Helpful Links and Resources

1. Learn more about your career in financial planning at:
[www.becomeafinancialplanner.ca](http://www.becomeafinancialplanner.ca)
2. Download the CFP Certification brochure:
<https://www.fpcanada.ca/docs/default-source/students/fp-canada-cfp-career_brochure.pdf>
3. Sign-up for exclusive promotions, industry events, news, and updates about FP Canada certifications:
<https://www.fpcanada.ca/become-a-financial-planner/home#SignUp>
4. Download FP Standard to stay up-to-date with ideas, thoughts and trends in the financial planning profession: <https://www.fpcanada.ca/docs/default-source/default-document-library/fp-standard-autumn-2023.pdf?sfvrsn=134e4e7b_3>

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