



FP Canada®

*Advancing Professional
Financial Planning*

FP Canada™ CE Approval Program Manual

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QAFP®

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GENERAL OVERVIEW

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.

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 in Canada are certified by FP Canada, a national, not-for-profit professional body working in the public interest. There are about 17,500 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.

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 professionals are certified by FP Canada, a national, not-for-profit professional body working in the public interest. QAFP 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.

Annual CE Requirements

To ensure that their knowledge and competence remains current and continues to expand, both CFP professionals and QAFP professionals are required to complete Continuing Education (CE) activities each year.

| REQUIREMENTS | CFP | PROFESSIONALS | QAFP | PROFESSIONALS |
|--|-----------------------|---|-----------------------------------|---|
| Verifiable Credits Required <i>(January 1 to December 31)</i> | 25 | | 12 | |
| Breakdown by Category | Annual Credits | Carry-Over Permitted to Next Calendar Year | Annual Credits | Carry-Over Permitted to Next Calendar Year |
| Financial Planning (FP) | 10 minimum | 25 maximum | 7 minimum | 12 maximum |
| Professional Responsibility (PR) | 2 minimum | No* | 1 minimum | No* |
| Practice Management (PM) | 5 maximum | No | 5 maximum combined for PM, PK, GB | No |
| Product Knowledge (PK) | 5 maximum | No | 5 maximum combined for PM, PK, GB | No |
| Giving Back (GB) | 5 maximum | No | 5 maximum combined for PM, PK, GB | No |

* Excess credits in the category of Professional Responsibility may be allocated to the Financial Planning category in the current year or following year.

CE REQUIREMENTS

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.

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

A portion of CFP professionals and QAFP professionals are randomly selected for audit each year and are subsequently required to provide official documentation of their CE activities.

Qualifying CE

For a full overview of FP Canada's CE requirements, please refer to the FP Canada website.

Qualifying CE falls under the following five categories:

1. [Financial Planning](#)
2. [Professional Responsibility](#)
3. [Practice Management](#)
4. [Product Knowledge](#)
5. [Giving Back](#)

See Appendix A for detailed descriptions of each CE category.

Within the above categories, CE activities may include (but are not limited to) seminars, conferences, webinars, in-house training, online courses with an exam, credit courses, prep courses, and courses for allied financial services professional licensing and/or designation.

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.

CE activities can be delivered through two different methods:

In-Person

The instructor, speaker, or discussion leader and students are engaged in the educational program at the same time. In-person activities may include seminars, webinars, conference sessions, panel discussions, structured discussion groups, and college or university courses. A live activity is delivered by an instructor, speaker, or discussion leader qualified to speak on the specific subject area(s) and must include evidence of satisfactory completion by the FP Canada certificant. This evidence would include either the provider's confirmation of the individual's participation or an examination scored by the CE provider where the participant has demonstrated his or her comprehension of the course content.

Online

The student engages in the learning activity without an instructor. A self-directed course is developed by an instructor qualified to teach in the specific subject area(s) and must include evidence of satisfactory completion by the FP Canada certificant. This evidence would include either the provider's confirmation of the individual's participation or an examination scored by the CE provider where the participant has demonstrated his or her comprehension of the course content.

To be considered qualified, FP Canada recommends that the instructor, speaker, or discussion leader have a professional credential in a relevant field and/or related work experience.

When requested by FP Canada, the organization providing CE must verify attendance or completion of the activity by a specific FP Canada certificant.

APPLICATION PROCESS

Become a CE Provider

Your organization's first step is to create an online account through the FP Canada portal. You will need to provide your organization's name, logo, address, website address, and contact information. You will also create a password to access your account in the future.

Once the registration process is complete, you will receive a CE Provider ID number. Use this along with your unique password to access your FP Canada portal.

Please see Appendix B for a step-by-step outline of the application process.

Submit an Activity for FP Canada Approval

Once you have registered an account with FP Canada, you may submit your activities via your FP Canada portal.

Please note: the information you provide in your application will be used to populate the FP Canada-approved 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.

You must provide the following information about each CE activity:

- Title
- Delivery method (in person, online)
- Level of difficulty (fundamental, intermediate, or advanced)
- Learning format (conference, credit course, in-house training, prep course, self-study course, seminar, or webinar)
- Description of content
- CE categories covered (see Appendix A for a list of category definitions)
- Credit hours
- Start and end date (or an indication that the activity is continuously available)
- Location
- Language
- Registration fee

Supporting materials, which may include an agenda, presentation, outline, handouts, storyboard, video, or any other supporting materials that demonstrate or describe the content covered. These materials will be used to evaluate your activity/activities and will not be displayed publicly. For online courses, we may also request direct online course access.

You may also provide a website link where people can register for or purchase your CE activity.

MFDA Accreditation

FP Canada has been approved by the Mutual Fund Dealers Association of Canada (MFDA) as a third-party accreditor for continuing education (CE). As a third-party accreditor, FP Canada is authorized by the MFDA to perform assessments of CE activity against standards established by the MFDA. This important authorization from the MFDA recognizes the merits of the longstanding FP Canada CE Approval Program.

Submit courses as part of the FP Canada CE Approval Program for the opportunity to have those courses reviewed for accreditation by the MFDA. Providers must then register the program separately with the MFDA, and a fee will be required by the MFDA.

CE ACTIVITY REVIEW PROCESS

FP Canada will review your application to ensure that the submitted CE activity relates to an appropriate CE category as defined in Appendix A. This review will typically be completed within 15 business days of receiving the application. You will be notified of any delay in the process. Following this review, FP Canada may, at its sole discretion, decline to accredit any courses submitted for accreditation. You will be notified of FP Canada's decision regarding accreditation via email. (and the decision (approved/not approved) will be reflected on your FP Canada portal).

Where the submitted CE activity is accredited, FP Canada will indicate the credit category and number of credits for which your CE activity qualifies, based on the assessment of the materials submitted. This assessment may result in less, or the same number of credits as you estimated in your application. You will be able to select an option to submit an activity application for the following:

- FP Canada Approval
- FP Canada and MFDA Approval
- MFDA Approval only

*Review fee schedule below for fee per activity application.

An approved CE activity is valid for two years, unless there is a material change to the activity. Upon expiry or in the event of a material change to the activity, FP Canada requires that the CE activity be resubmitted for approval.

A material change is considered to have occurred under any of the following conditions:

- One or more of the CE categories identified on your application is no longer covered.
- One or more of the financial planning areas identified on your application is no longer covered.

- The duration of the activity has changed.
- The format or delivery method of the activity has changed.

To maintain the integrity of the program, FP Canada may audit approved CE activities. This process could include site visits or require submission of additional documentation to confirm ongoing compliance with FP Canada’s requirements.

The [FP Canada portal](#) is your source for all information regarding the status of an application for CE activity approval and where you may modify or add activities, view your payment history, and edit your organization’s information.

Please note that the CE activity review process will begin once payment has been received. Based on selection during the application process the following fees will apply.

Fee Schedule

| CE CREDIT APPROVAL FEE | FEE | APPROVAL PERIOD |
|--|---------------------------------|--|
| CE Credit Approval Fee - FP Canada | \$110/credit hour plus tax* | Valid for 2 years unless there is a material change to the CE activity |
| CE Credit Approval Fee - MFDA | \$110/credit hour plus tax* | Valid for 2 years unless there is a material change to the CE activity |
| CE Credit Approval Fee - FP Canada & MFDA | \$115/credit hour plus tax* | Valid for 2 years unless there is a material change to the CE activity |
| Rush Request: Approval guaranteed within 2-5 business days of receiving content <i>(excludes programs seeking approval for the Professional Responsibility Category)</i> | \$350/per application plus tax* | Valid per application and review time is within 2-5 business days (based on completed application) |

*5% GST in AB, BC, MB, NT, NU, QC, SK, YT; 13% HST in ON; 15% HST in NB, NL, NS, PEI

The CE credit approval fee is based on the number of credits being submitted for an activity.

Rush Review Fee

In addition to the CE credit approval fee, FP Canada offers a review rush fee (per CE activity application), allowing for the opportunity for an expedited application review process. We will review your CE activity application within 3-5 business days of receiving it to ensure that the submitted CE activity relates to an appropriate CE category as defined in Appendix A. A decision will be sent to you via email (and will be reflected on your FP Canada portal). You will be notified of any delays in the process.

If you have questions about calculating the CE credit approval fee, please contact Hellen Kountouros at hkountouros@fpcanada.ca.

Payment

Payments can be made online by Visa or Mastercard at the time of application, or by cheque by selecting the invoice option when an activity is submitted for review. All cheques must be made payable within 30 days of the invoice date to “FP Canada” and mailed to the following address:

FP Canada
Attention: FP Canada CE Approval Program
902-375 University Avenue
Toronto, Ontario M5G 2J5

If FP Canada is unable to approve a submitted CE activity, we will reimburse all but one credit hour (\$110). If your activity is approved for fewer credits than requested on your application, FP Canada will refund the difference in fees.

DECISION REVIEW POLICY

FP Canada may, at its sole discretion, decline to accredit any courses submitted for accreditation. Where a course is approved for accreditation, FP Canada will grant the number of credits for a CE activity based on our assessment of the application and supporting materials. The number of credits awarded may vary from the number of credits that were estimated in your application.

If you disagree with our decision regarding the number of credits, you may submit a request in writing, to have your application re-reviewed, along with any new supporting materials, within two weeks of receiving the initial decision. Upon receiving such a request, we will conduct a second review of the activity and inform you of our decision by email within five business days.

If you are still unsatisfied with FP Canada’s decision, you may file an appeal. Your complaint will be escalated through our complaints handling process, which includes an external ombudsperson.

RENEWAL PROCESS

CE activities expire after two years, or earlier if there is a material change to the activity.

To renew a CE activity, log in to your FP Canada portal and re-submit an application for approval, along with the appropriate CE credit approval fee.

REQUIRED DISCLAIMER

CE providers must include the following disclaimer in written or verbal form at the beginning of any FP Canada-approved CE Activity:

This CE activity has been approved by FP Canada as meeting the minimum requirements for CE approval as outlined within the [QAFP Certification Policies](#) or [CFP Certification Policies](#). 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.

ADVERTISING AND TRADEMARK RIGHTS AND USE

As a CE provider with FP Canada-approved CE activities, you must abide by and uphold FP Canada's specifications when promoting your organization and CE activities. FP Canada requires that CE providers follow the rules below when using the FP Canada CE credit logo, FP Canada marks, CFP marks, and QAFP marks on all materials (e.g. completion certificates, websites, advertisements, and other printed materials). If you have questions about how to use any of the marks, please contact us at info@fpcanada.ca.

Requirements for Using the CFP Marks and QAFP Marks

CE providers who wish to use the CFP marks and QAFP marks must follow the rules described in the [CFP Marks Usage Guide](#) and [QAFP Marks Usage Guide](#).

Requirements for Referring to the FP Canada CE Approval Program

CE providers should refrain from promoting their organization as “registered with” or “approved by” FP Canada, as FP Canada cannot account for or endorse an organization's entire CE program — only those activities that are submitted and approved.

When promoting or advertising an FP Canada-approved CE activity, CE providers may reference only the CE activities that have been approved through the FP Canada CE Approval Program.

Correct Use

- ABC Financial Inc. wealth management seminar qualifies for 7 FP Canada-approved CE credits.
- This retirement planning seminar has been reviewed by FP Canada and qualifies for 10 FP Canada-approved CE credits.

Incorrect Use

- ABC Financial Inc. is an FP Canada-approved CE provider.
- ABC Financial Inc. is an FP Canada-registered CE provider.
- ABC Financial Inc. wealth management seminar qualifies for 20 CFP CE credits.
- ABC Financial Inc. wealth management seminar qualifies for 7 QAFP CE credits.


Process for Using the CE Credit Logo

The FP Canada CE Credit logo is available for any denomination of credits from 0.25 to 50.

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

Requirements for Using the CE Credit Logo

When using the FP Canada CE Credit 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:

The FP Canada CE Credit logo and QAFP marks are trademarks of FP Canada. CFP®, Certified Financial Planner® and  are certification trademarks owned outside the U.S. by Financial Planning Standards Board Ltd. (FPSB). FP Canada is the marks licensing authority for the CFP marks in Canada, through agreement with FPSB.

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

Correct use



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



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

If you have additional questions, please contact Hellen Kountouros at hellen.kountouros@fpcanada.ca.

TERMINATION

If any of the requirements outlined in the FP Canada CE Approval Program Manual are not fulfilled, FP Canada has the sole discretion to immediately revoke the status of any CE activities approved through this program. In such instances, all references to the FP Canada CE Approval Program, including the use of any marks or logos, must be removed from all websites, communications, and other materials, FP Canada is released from all obligations and liabilities, any outstanding fees must be paid to FP Canada, and no reimbursement will be granted.

- Cover page
- Table of contents page
- Body content

Section settings and breaks may be modified as required by displaying paragraph marks, and by modifying Headers and Footers. When a section break is deleted, the contents are merged and will take on the formatting of the content after the deleted section break.

APPENDIX A – FP CANADA CE CATEGORIES

FP Canada’s CE requirements go beyond maintaining technical competence. They are designed to support the maintenance and ongoing professional development required to continue meeting client needs. CE requirements include the following five categories:

Financial Planning

Qualifying CE must be related to one or more aspects of the competency profiles published by the FP Canada Standards Council, which serve as the foundation of FP Canada certification requirements. CE in this category may relate to one or more of the financial planning areas, professional skills, and technical knowledge.

Financial Management

The assessment of a client’s cash flow, budget and net worth and the development of strategies and techniques to optimize short- and mid-term saving, spending and borrowing decisions to meet the client’s goals.

Investment Planning

The assessment of a client’s asset mix and holdings, based on investment knowledge, objectives, risk tolerance and time horizon, and the development of strategies and techniques to optimize the client’s portfolio and resulting return to meet the client’s financial goals.

Insurance and Risk Management

Strategies and techniques to manage risk exposure to potential financial loss due to personal circumstances. In this financial planning area, the terms “risk”, “risk exposure” and “risk tolerance” refer to the risk of financial loss due to personal circumstances, as opposed to investment risk.

Tax Planning

The assessment of a client’s current tax position, and the development of strategies and techniques to minimize or defer taxes and maximize the client’s after-tax income.

Retirement Planning

The assessment of a client’s expected lifestyle in retirement, comparison of estimated needs to current retirement assets, planned savings and expected return on investment, and the development of strategies and techniques to bridge any gaps. It also involves the assessment of retirement income options and the development of strategies and techniques to meet the client’s income needs.

Estate Planning (including Legal Aspects)

The assessment of a client's estate wishes and development of strategies and techniques to help ensure the payment of expenses and obligations at death; also, the efficient transfer of assets to beneficiaries based on the client's goals.

Professional Skills

Professional skills—including skills categorized under 'Communication' and 'Cognitive Abilities and Judgment'—are inherent in the fulfillment of each and every financial planning function and competency with each and every client. CFP professionals and QAFP professionals could be applying several of the professional skills throughout any given client engagement. They represent the fundamental abilities that define a true professional.

Professional Responsibility

The Professional Responsibility requirement is designed to support and enhance your understanding of your professional duties and to provide approaches for identifying and addressing common ethical dilemmas and challenges that you may face. Qualifying CE requires practical application of the principles and rules in the FP Canada Standards Council Standards of Professional Responsibility to ethical dilemmas that financial planners commonly encounter. CE should include the use of scenarios and/or practical examples to illustrate the situations. CE activities that focus on direct knowledge or rote recall of the Standards of Professional Responsibility without demonstrated understanding and application will not qualify.

Examples of Qualifying CE:

- In-person workshop where participants review examples of ethical dilemmas that financial planners may encounter and how the Standards of Professional Responsibility may apply.
- Online, self-directed course where learners are asked to consider ethical dilemmas that financial planners may encounter and are asked to contemplate, through interactive online activities or assessment, how the Standards of Professional Responsibility may apply.

Examples of Non-Qualifying CE:

- In-person workshop that provides an update on the regulatory environment and outlines mutual fund and securities regulation for advisors but does not apply the Standards of Professional Responsibility to examples or scenarios of ethical dilemmas.
- Online, self-directed course that presents and explains the Standards of Professional Responsibility but does not apply the principles or rules to examples or scenarios of ethical dilemmas that financial planners may encounter.

Practice Management

Qualifying CE includes the knowledge and skills used in building professional relationships and growing a professional practice. CE in this category may include activities focused on prospecting, business planning, business development, networking, or sales skills.

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. Ideally, 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.

Giving Back

Qualifying CE includes volunteering with FP Canada, community organizations, industry associations or charitable groups in a way that helps Canadians understand the importance of financial planning and/or enhances their financial well-being. CE in this category may include involvement in pro bono teaching or development of education programs, community involvement, development of published financial planning research, or involvement in financial planning-related committees, task forces, or focus groups.

APPENDIX B – CE ACTIVITY APPLICATION PROCESS

Step 1: Create an FP Canada Portal Account

In order to submit CE activities for the FP Canada CE Approval Program, CE providers must first create an account for the FP Canada Portal. Visit the FP Canada Portal and click on “Become a CE Provider.” The instructions below outline, how to complete the account creation form.

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 approved) on the FP Canada-Approved 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 Portal and clicking “Edit your CE provider profile.”

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

Login to your [FP Canada 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 Portal account will be auto populated in the General Information and Business Address sections. Please 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-Approved [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 approval.

Activity Title

Enter the title of the activity as you would like it to appear on the FP Canada-Approved 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 Level

Select the level of the activity (i.e. Fundamental, Intermediate, Advanced) from the drop-down menu. Please see the definitions below as a guide:

Fundamental

These activities are designed to provide foundational knowledge in the topic, covering material at a basic level, including essential or core concepts, likely presenting them one at a time and applying them to single-topic scenarios with limited factors to consider. The activity lays the groundwork for higher depth and complexity in more advanced level offerings on the subject.

Intermediate

These activities are designed to cover topics, skills or concepts that require the integration of information learned in more fundamental activities, likely applying it to multiple-topic scenarios with several factors to consider, potentially across more than one of the functions of Collection, Analysis and Synthesis as described in the competency profiles published by the FP Canada Standards Council.

Advanced

These activities are designed to focus on topics, skills or concepts at a level of detail beyond intermediate, consistent with the competency level of those who hold themselves out as specialists in the subject matter, likely applying them to multiple topic scenarios with highly complex factors to consider, potentially across more than one of the functions of Collection, Analysis and Synthesis as described in the FP Canada Standards Council Competency Profile.

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-Approved 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 approval, 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-Approved CE Search Tool

Select this option if you do not wish for your activity to appear on the FP Canada Approved 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 Approved [CE Search Tool](#).

If you would like to change any information in this section in the future, contact Hellen Kountouros at hkountouros@fpCanada.ca.

Step 3: Attestations

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

This CE activity has been approved by FP Canada as meeting the minimum requirements for CE Approval as outlined within the FP Canada Continuing Education Guidelines. 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.

Check the box to attest to the following:

As a provider of FP Canada-Approved 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 Approved CE Credit logo, FP Canada marks, CFP® marks and QAFP® marks on my materials (i.e. completion certificates, websites, advertisements, and other printed materials) according to the rules outlined in the FP Canada CE Approval Program Manual.

Step 4: Complete Order

Review your payment details listed. Select 'Invoice' if you would like to receive an invoice or input your credit card details to pay directly online. If you request to be invoiced, please enter a PO (purchase order) number to help expedite processing of your payment. Select "Pay" to complete your application.

Payment Status

You will receive a receipt or invoice by email along with instructions on submitting the required supporting documentation. You will also be able to download your registration summary.

Order Confirmation

Review the status of your payment transaction or invoice. You may print this page as your invoice or payment receipt. You will also be able to view your payment history online through your [FP Canada Portal](#).