

# CFP® Professional Education Program

## ✓ Key Features

- Duration: 110-160 hours
- Convenient online format
- Complete at your own pace
- Interactive user experience

## 💰 Introductory Cost

\$1,500

The CFP® Professional Education Program teaches students the new skills needed to thrive in a world where traditional roles are being disrupted by technology, and helps students learn how to apply their technical knowledge to real world, complex client engagements. The program covers principles of human behaviour and professional skills in the areas of communications, critical thinking, relationships and ethics, all of which are applicable in the highly complex client situations that CERTIFIED FINANCIAL PLANNER® professionals regularly encounter in their practices.

- Introduces models, guidance and techniques for undertaking all phases of the financial planning process as well as key concepts in human behaviour and ethics, all of which may be required in client engagements that are both more and less complex
- Uses real-world case scenarios to develop a deep understanding of, and competence in, holistic financial planning, applying key facets of human behaviour and addressing common ethical dilemmas in client situations at all levels of complexity
- Is an online program, supplemented with live instructor interaction, and is designed to be the equivalent standard of difficulty and duration as a full semester university course



## How to Register

1. Create an account and login to the FP Canada Portal.
2. Go to the "My Applications" page
3. Select the FP Canada Institute Education Application
4. Complete the Application
5. Select your preferred program start date

## Program Description

Includes seven end-of-unit assignments and one final assessment.

- Unit 1: Value Proposition
- Unit 2: Terms of Engagement
- Unit 3: Discovery
- Unit 4: Analysis
- Unit 5: Recommendations and Plan
- Unit 6: Implement Financial Planning Recommendations
- Unit 7: Monitor and Review

## Maximum Allowable Time to Complete the Program

12 months from the start date