FPSB

FINANCIAL PLANNING STANDARDS BOARD

Global Excellence in Financial Planning

CFP

FPSB Member Organizations

1. Financial Planning Association of Australia Ltd.
2. Österreichischer Verband Financial Planners
3. Instituto Brasileiro de Certificação de Profissionais Financeiros
4. Financial Planning Standards Council
5. Financial Planning Standards Board China Ltd. (Shanghai)
6. Financial Planning Association of Taiwan
7. Association Francaise des Conseils en Gestion de Patrimoine Certifies
8. Financial Planning Standards Board Deutschland
9. Institute of Financial Planners of Hong Kong Ltd.
10. Financial Planning Standards Board India
11. Financial Planning Standards Board Indonesia
12. Financial Planning Standards Board Ireland
13. Japan Association for Financial Planners
14. Financial Planning Association of Malaysia
15. Financial Planning Standards Board Nederland
16. Institute of Financial Advisers
17. Financial Planning Standards Board Korea
18. Financial Planning Association of Singapore
19. Financial Planning Institute of Southern Africa
20. Swiss Financial Planners Organization
21. Thai Financial Planners Association
22. Institute of Financial Planning Ltd.
23. Certified Financial Planner Board of Standards, Inc.

As the preeminent international standards-setting body for competent and ethical financial planners, Financial Planning Standards Board benefits the public by creating and upholding rigorous professional standards for the financial planning profession globally.

We believe in the value of the financial planning process—which includes an integrated approach to financial management, investing, risk, tax, retirement and estate planning—and the value that a relationship of trust with a CERTIFIED FINANCIAL PLANNER professional can provide.

Our vision to establish financial planning as a global profession, with the CFP Marks its symbol of excellence, is becoming reality. And, we are focused on achieving our objectives and public interest mission through partnerships with nonprofit associations, government bodies and consumer groups around the world.

FPSB invites you to engage with the growing global community of financial planning certification bodies that have chosen financial planning's marks of professional distinction—CFP, CERTIFIED FINANCIAL PLANNER and CFP. Together, we can help members of the public plan their futures and find qualified, competent financial planners who put their clients' interests first.

Noel Maye
FPSB CEO

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Setting the Global Standard for Financial Planning

Financial Planning Standards Board Ltd. (FPSB) is a nonprofit association that 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.

"Becoming a CFP professional was an important milestone in my career. CFP certification gives financial planners a solid background in all the areas that affect a client's financial wellbeing. Through my work with FPSB, I appreciate knowing there are other financial advisers around the world like me who meet the same high standards. Our shared education, experience and commitment to excellence sets us apart as financial planning professionals."

— STEPHEN O'CONNOR, CFP CERT ™
INVERCARGILL, NEW ZEALAND
2009 FPSB BOARD CHAIRPERSON

Working through our member organizations, FPSB creates internationally relevant, professional standards for financial planning practitioners so that:

- the public can identify qualified financial planners;
- practitioners can distinguish themselves as trusted financial planning professionals; and
- consumers and regulators can have confidence in the financial planning profession and recognize the benefits that financial planning offers.

FPSB's certification standards demonstrate to those accessing the services of a CERTIFIED FINANCIAL PLANNER professional that the financial planner has met rigorous competency, ethics and professional practice standards to provide financial planning to clients.

To administer the CERTIFIED FINANCIAL PLANNER certification program in a territory, FPSB enters into a licensing and affiliation agreement with the preeminent nonprofit financial planning standards-setting or professional body. By meeting and maintaining FPSB's affiliation requirements and standards, FPSB Member organizations are authorized to administer the CFP certification program in a territory on behalf of FPSB.

FPSB's enforcement of its certification standards through a network of 23 member organizations, and a public-interest mission, has established the CFP Marks as the global symbol of excellence for financial planning.

Marks of Professional Distinction

Financial planning is the process of developing strategies to help people manage their financial affairs to meet life goals. Everyone can benefit from using the financial planning process to understand his or her current financial situation and develop a plan for the future.

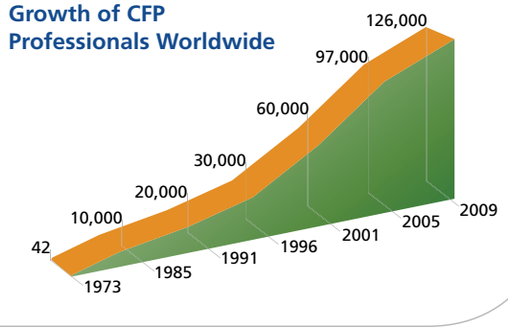
A CFP professional is a trusted adviser who works with clients to review all of their options so they can make informed decisions about their financial situations at every stage in life. By meeting rigorous international competency, ethics and professional practice standards, a CFP professional is qualified to deliver integrated financial solutions that allow clients to take control of their finances and achieve their life goals.

CFP certification is the only globally recognized mark of professionalism for financial planners. To obtain CFP certification, individuals meet initial certification requirements adapted to local marketplaces by FPSB Member organizations.

CERTIFIED FINANCIAL PLANNER professionals demonstrate and maintain competency throughout their careers while:

- providing financial planning in the best interest of clients;
- advising clients and presenting recommendations across a broad range of financial disciplines;
- making professional judgments in ambiguous or complex situations; and
- acting ethically and professionally in their dealings with clients, potential clients, peers and others.

Growth of CFP Professionals Worldwide



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Global Perspective, Local Impact

FPSB Member organizations administer the CFP certification program on six continents. Organizations join FPSB to align with the reputation and mission of the world-famous CFP certification program and to receive a variety of member benefits.

FPSB Membership Benefits:

Community
With 23 standards-setting bodies on six continents, FPSB provides a global forum for organizations interested in sharing best practices, leveraging mutual experiences, and gaining knowledge and support to enhance standards-setting efforts in a territory.

Promotion
Building on our 40-year history, and the collective experiences and programs of FPSB Member organizations, FPSB offers materials and tools to help organizations promote the financial planning process and CFP Marks.

Technical, Standards and Policies
As the oldest, largest professional financial planning certification program, FPSB possesses an unparalleled depth of knowledge and experience in setting professional competency, ethics and practice standards for financial planning.

Development and Training
FPSB assesses member programs and provides feedback to enhance certification functions in topics relating to the development, enforcement and promotion of financial planner certification.

Trademark
FPSB has a wealth of knowledge in intellectual property protection matters. FPSB supports organizations in promoting, protecting and ensuring proper use of the CFP Marks and facilitates cross-border activity by CFP professionals.

Issues Analysis and Research
FPSB is uniquely positioned to monitor trends in global financial services. FPSB aggregates information about member issues and supports global research on particular issues of interest.

Information Clearinghouse
FPSB regularly receives information from member organizations and other sources from around the world which it catalogues and makes available through its members-only website.

Advocacy and Representation
Through written commentary, conversations, meetings and presentations, FPSB supports the emergence of a financial planning profession by advocating for public-interest regulations and standards that are fair to consumers, practitioners and firms.

Alliances
As a global standards-setting organization, FPSB engages with regulators, firms, educators, media, consumer advocacy groups and other credentialing organizations around the world.

Make an impact in your territory by connecting with FPSB, the global organization fostering excellence in financial planning worldwide.

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Financial Planning Standards Board Ltd. (FPSB) owns the CFP, CERTIFIED FINANCIAL PLANNER and CFP (with flame logo) marks outside the United States, and permits qualified individuals to use these marks to indicate that such individuals have met FPSB's initial and ongoing certification requirements.