



Building a strong profession today, for tomorrow

Membership Benefits

Advocacy:

Strong advocacy on specific and peripheral issues affecting the financial planning profession and industry in Canada by representing CIFPs members on matters of common interest before governmental and regulatory bodies and any other organization or persons.

Networking and Education:

To assist Members with their professional development needs via a local chapter network in conjunction with a National Annual Conference.

Quality Continuing Education Courses:

As part of your membership benefits, choose up to three (3) titles from a comprehensive suite of Continuing Education (CE) courses. All our CE courses are available in an online format with the option to print the content directly from your computer as you deem appropriate. Our CE courses allow you to fulfill your annual continuing education requirements to uphold your CFP® designation through a single, trusted and proven education provider¹. Successful completion of each CE course (including an online assessment) enables you to claim up to eight (8) FPSC verifiable credits for purposes of maintaining your CFP credential*. Credits can also be claimed to meet insurance CE requirements where required.

Comprehensive Error and Omissions Program:

Our members are eligible to apply for Errors and Omissions offered through Marsh Canada. We offer competitively priced coverage for both fee-for-services only and licensed agents in varying liability amounts.

The Insurance Journal:

Members of CIFPs, as part of their base membership benefits will receive The Insurance Journal each month at no additional cost. New to the Insurance Journal is a special section called "Focus on Financial Planning" providing in-depth, timely coverage of topics on industry news and trends, product information and case studies.

Information Resources Centre:

In the members section of our Web site, members have access to our Information Resource Centre. Here you will find the content used for the CIFP CFP® Certification Program—an FPSC-approved, core curriculum program that is a critical first step on the path to CFP certification. You will have access to content that is updated on an annual basis reflecting the most up-to-date legislative amendments. Also included, is access to the online CE courses we offer for reference purposes. This can be used as a valuable resource when you meet with your clients.

Financial Planners Practitioner's Guide:

The Financial Planners Practitioner's Guide is a practical, user friendly, financial planning guide offering forms, letters, checklists and templates as well as in-depth information on all related topics which are used to prepare both segmented and comprehensive financial plans.

Current Trends and Issues in Financial Planning

This annual publication updates current trends and issues in the financial planning industry. Members receive this update each year as part of their member benefits and can also take this update as one of their CE courses for the year.

¹ CIFP/CIFPs creates and/or sponsors its educational offerings in consideration of the continuing education guidelines set by the Financial Planning Standards Council (FPSC). It is the responsibility of the CFP professional to assess the appropriateness of this education content for purposes of claiming CE credits. Claims for CE credits are subject to review and approval by FPSC.



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Vision

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Mission

Provide the Best and Most Cost Effective Professional Services to Members through our Organizational Objects:

- To collectively represent CIFPs members on matters of common interest before governmental and regulatory bodies and any other organization or persons
- To support the Financial Planners Standards Council in achieving its mission and vision
- The provision to Members and other persons to whom knowledge of financial planning will be beneficial, whether in connection with their business or their personal activities, of opportunities to acquire and improve such knowledge
- The research, development and administration of educational programs concerning financial planning and matters related thereto, including programs intended to be offered by the corporation and programs intended to be offered by others
- The development of facilities and techniques for the dissemination of non-partisan information to the general public of information relating to financial matters
- The development of relationships with other institutes and associations carrying on activities in areas relevant to the work of the corporation, in order to foster a system of shared facilities, services and information
- To provide overall policy direction to its chapters and any affiliated bodies
- To co-ordinate relations among its chapters and affiliated bodies
- To provide such benefits to its Members as deemed by the Board to be in the best interests of Members



The CIFPs does not award the CERTIFIED FINANCIAL PLANNER® designation. CFP®, CERTIFIED FINANCIAL PLANNER® and  are certification marks owned outside the U.S. by Financial Planning Standards Board Ltd. (FPSB). Financial Planning Standards Council is the marks licensing authority for the CFP marks in Canada, through agreement with FPSB.