

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, you will receive the "Professional Responsibility" course "Ethical Conduct for CFP® Professionals" and are entitled to select up to three eight (8) credit courses (you may swap one of these for 2 four credit courses if desired) to complete your 25 credits of continuing education requirements with FPSC. Upon successful completion of each course, you will be awarded the CE credits. All CE courses are available in online format with the option to print the material directly from your computer. The same CE title may not be taken two years in a row.

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.

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.



Vision

Building a Strong Profession Today, for Tomorrow

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

® CIFPs does not award the CFP® and CERTIFIED FINANCIAL PLANNER® designation. The right to use the marks CFP® and Certified financial planner® is granted under license by the FPSC to those persons who have met its educational standards, passed the FPSC Certified Financial Planner® Examination, satisfied a work experience requirement and agreed to abide by the FPSC Code of Ethics.