



# CERTIFIED FINANCIAL PLANNER<sup>CM</sup> Professional

## The Roadmap to Certification

### Capstone Course Prerequisites



### EDUCATION

#### ① The Financial Planning Process

- Financial Planning Process
- Practice Standards
- Professional Skills
- Client Characteristics
- Client Engagement and Communication
- Critical Thinking

#### ② Engaging Clients for Life

- Introduction to the Discovery Process
- Appreciative Inquiry
- Discovery Process Applied
- Goal Determination, Refinement and Setting
- Develop Financial Planning Recommendations
- Presenting Recommendations to Clients

#### ③ Developing Effective Financial Plans

- Financial Planning Overview
- Financial Plan Elements
- Developing Effective Plans
- Sample Financial Plans
- Financial Plan Assessment

Are you ready for a world-class learning experience and certification brought to you by Financial Planning Standards Board Ltd., the standards-setting body for the global financial planning profession? Taken through an Authorized Education Provider, the FPSB<sup>®</sup> Financial Planning Capstone course prepares you to draw on the knowledge gained through FPSB Ltd.'s specialist education tracks (investment planning; retirement and tax planning; and risk and estate planning) to develop strategies to help clients achieve their financial and life goals.

The course teaches you to integrate technical topics, behavioral finance principles and client engagement skills to build relationships of trust; identify client goals, needs and objectives; and develop effective financial plans. With CERTIFIED FINANCIAL PLANNER<sup>CM</sup> certification, the global symbol of excellence in financial planning, you will join a growing international community of ~190,000 professionals who are recognized by employers, clients and the public for their superior skills and knowledge, for their commitment to ethics and professionalism, and for putting their clients' interests first.

