

# About FPSB



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## Leading the global financial planning profession

Financial Planning Standards Board (FPSB) is the nonprofit, international standards-setting body for the global financial planning profession.

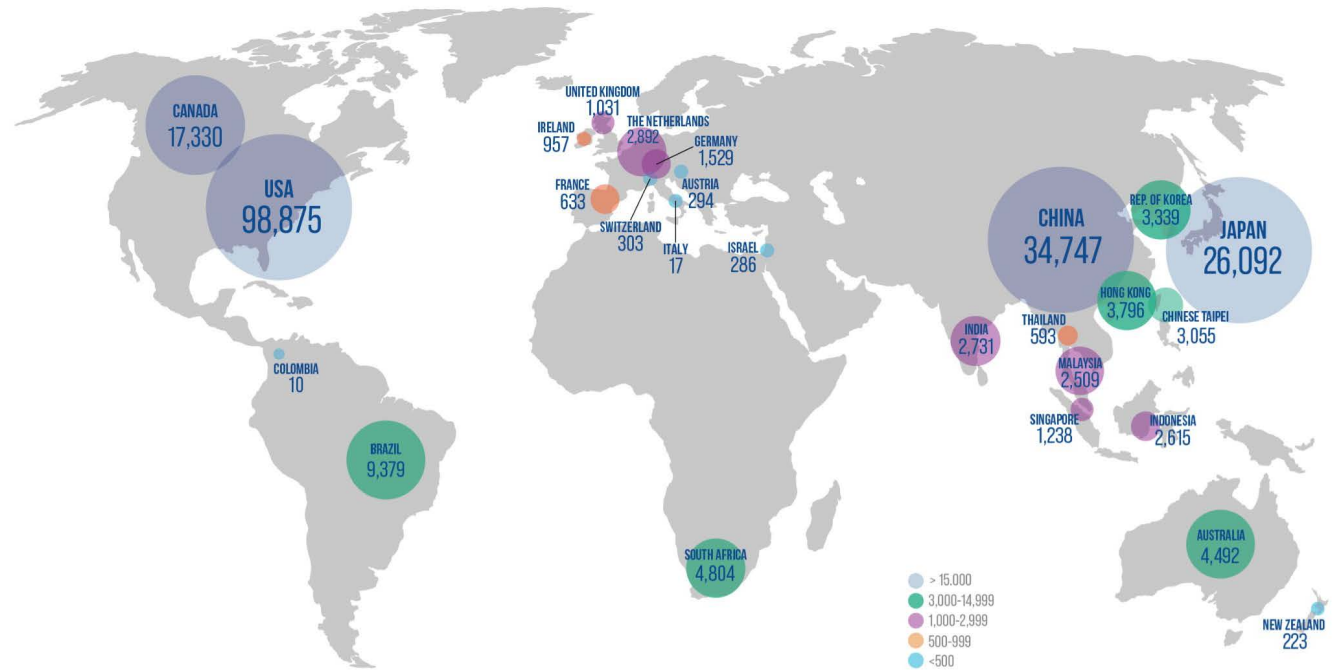
## Excellence in financial planning

CFP certification is the global symbol of excellence in financial planning and represents financial planning professionals with a shared commitment to rigorous international standards, ethical practices and lifelong learning to better serve their clients.

FPSB is the proud owner of the international CERTIFIED FINANCIAL PLANNER certification program outside the United States.

## Global reach

Together with its global network of organizations, FPSB certifies 223,770 CFP professionals in 28 territories.



FPSB and its global network of organizations **strengthen, promote and propel excellence in financial planning** for the benefit of the public and our global community by facilitating collaboration, advocacy and setting standards.

## FPSB's network of organizations spanning 28 territories

### Australia

CFP certification offered by: Financial Advice Association Australia (FAAA)

### Austria

CFP certification offered by: Österreichischer Verband Financial Planners (OVFP)

### Brazil

CFP certification offered by: Planejar – Associação Brasileira de Planejamento Financeiro (Planejar)

### Canada

CFP certification offered by: FP Canada

### People's Republic of China

CFP certification offered by: Financial Planning Standards Board China Ltd. (FPSB China)

### Chinese Taipei

CFP certification offered by: Financial Planning Association of Taiwan (FPAT)

### Colombia

CFP certification offered by: Asociación Colombiana de Planeación Financiera (ACPF)

### France

CFP certification offered by: Association Française des Conseils en Gestion de Patrimoine Certifiés (CGPC)

### Germany

CFP certification offered by: Financial Planning Standards Board Deutschland e.V. (FPSB Deutschland)

### Hong Kong and Macau

CFP certification offered by: Institute of Financial Planners of Hong Kong Ltd. (IFPHK)

### India

CFP certification offered by: FPSB Institute India Private Limited (FPSB India)

### Indonesia

CFP certification offered by: Financial Planning Standards Board Indonesia (FPSB Indonesia)

### Ireland

CFP certification offered by: Financial Planning Standards Board Ireland (FPSB Ireland)

### Israel

CFP certification offered by: Financial Planners Association in Israel (FPAI)

### Italy

CFP certification offered by: Financial Planning Standards Board Italia (FPSB Italia)

### Japan

CFP certification offered by: Japan Association for Financial Planners (JAFFP)

### Republic of Korea

CFP certification offered by: Financial Planning Standards Board Korea (FPSB Korea)

### Malaysia and Brunei

CFP certification offered by: Financial Planning Association of Malaysia (FPAM)

### The Netherlands

CFP certification offered by: Federatie Financieel Planners (FFP)

### New Zealand

CFP certification offered by: Financial Advice New Zealand (FA NZ)

### Singapore

CFP certification offered by: Financial Planning Association of Singapore (FPAS)

### South Africa

CFP certification offered by: Financial Planning Institute of Southern Africa (FPI)

### Switzerland

CFP certification offered by: Swiss Financial Planners Organization (SFPO)

### Thailand

CFP certification offered by: Thai Financial Planners Association (TFPA)

### United Kingdom

CFP certification offered by: Chartered Institute for Securities & Investment (CISI)

### United States

CFP certification offered by: Certified Financial Planner Board of Standards, Inc. (CFP Board)

# Vision, Mission & Strategy



# Vision, Mission & Strategy


In alignment with its vision and mission, FPSB's strategic framework provides the focus for its priorities and initiatives as the standards-setting body leading the global financial planning profession.



## Vision

FPSB's vision is to establish financial planning as a global profession and the CFP marks as the global symbol of excellence in financial planning.

## Mission

FPSB's mission is to benefit the global community by establishing, upholding and promoting worldwide professional standards in financial planning. FPSB's commitment to excellence is represented by the marks of professional distinction—CFP, CERTIFIED FINANCIAL PLANNER and .

## Principles of Partnership

FPSB and its global network of organizations work together to strengthen, promote and propel excellence in financial planning for the benefit of the public and the global community by facilitating collaboration, advocacy and setting standards.

This collaboration brings together leaders and volunteers from the global profession who openly share their knowledge, experience and innovations for the greater benefit of the profession.

This collaboration is articulated in the Principles of Partnership. These principles define how FPSB and its network work together and demonstrate commitment to the shared purpose of establishing CFP certification as the global symbol of excellence in financial planning.

### Principles of Partnership

- **Active participation:** We are active, engaged, responsive and contributing members of the FPSB Network
- **Awareness:** We raise awareness and understanding of what financial planning and CFP certification are and their benefit to the public
- **Common goals:** We collaborate and support each other to achieve our shared purpose globally, cross-regionally, in-territory, and with stakeholders
- **Excellence:** We uphold the global standards of financial planning via promotion and protection of CFP certification
- **Global impact:** We make the world a better place by helping to improve the financial capability and wellbeing of individuals worldwide
- **Growth:** We actively work to increase the number of CFP professionals globally
- **Share and learn:** We share experiences, connections and insights, and contribute to research and data
- **Thought leadership:** Through debate, new ideas and research, we actively drive the future of the profession



## Strategy

For the past ten years, FPSB's strategic efforts have been guided by its **LASER Strategy**, comprising Leadership, Awareness, Standards, Engagement and Recognition.

With an eye towards 2030, work was undertaken throughout 2022-23 to comprehensively review FPSB's strategic framework. Guided by the FPSB Board of Directors, the review and development of the updated framework was informed by research and input from key stakeholders within FPSB's global network. The new FPSB Strategy was unveiled at the FPSB 2023 Global Meeting in Singapore.

The new **FPSB Strategic Framework** is built around the acronym "FPSB", which stands for **F**inancial Planning Professionals, **P**artnerships, **S**tandards & Certification and **B**randing & Awareness. Each pillar of the FPSB framework serves to focus efforts on strategies that have the greatest impact in moving toward FPSB's mission and vision.

**F**

**Financial Planning Professionals**

**P**

**Partnerships**

**S**

**Standards & Certification**

**B**

**Brand & Awareness**

# Vision, Mission & Strategy

## In detail: FPSB Strategic Framework

			Long term objectives
<b>F</b>	<b>Financial Planning Professionals</b>	Grow the number of CFP professionals to position CFP certification as the designation of choice for the financial planning profession worldwide.	<ul style="list-style-type: none"> <li>• Grow and retain <b>CFP professionals</b> by focusing on local, regional and global growth</li> <li>• Expand the <b>number of territories</b> where CFP certification is delivered</li> <li>• Increase the proportion of CFP professionals <b>under 40 years of age</b></li> <li>• Improve the <b>diversity</b> of CFP professionals to reflect the public they serve</li> </ul>
<b>P</b>	<b>Partnerships</b>	Partner with key stakeholders to strengthen the global financial planning profession and benefit the public.	<ul style="list-style-type: none"> <li>• Harness the collective strength of the <b>FPSB Network</b> to lead the global CFP professional community</li> <li>• Work with <b>financial services firms</b> to increase their commitment to financial planning and CFP certification</li> <li>• Partner with key stakeholders in <b>new territories</b> to promote the financial planning profession and deliver CFP certification</li> <li>• Engage with international and local <b>government agencies, consumer advocacy groups and professional bodies</b> to increase recognition of the value of financial planning and improve access</li> </ul>
<b>S</b>	<b>Standards &amp; Certification</b>	Set, maintain and enforce global financial planning standards and CFP certification requirements to protect and serve the public, and advance the profession.	<ul style="list-style-type: none"> <li>• Ensure the <b>standards and certification requirements</b> reflect evolving professional, academic and consumer needs</li> <li>• Achieve <b>global consistency</b> in the application of CFP certification</li> <li>• Develop and maintain <b>global content</b> for education, examination and professional development</li> <li>• Advance the <b>CFP certification framework</b> to reflect the evolving certification landscape</li> </ul>
<b>B</b>	<b>Brand &amp; Awareness</b>	Increase awareness of financial planning with CFP certification as its symbol of excellence, and position FPSB as the global leader of the profession.	<ul style="list-style-type: none"> <li>• Increase public <b>awareness and understanding of financial planning</b></li> <li>• Build public <b>recognition of CFP certification</b> to become synonymous with financial planning</li> <li>• Promote the <b>value of CFP certification</b> among professionals</li> <li>• Position FPSB as the <b>global authority and voice of the profession</b></li> </ul>