

FPSB 20 YEARS
CELEBRATING



About FPSB

Leading the global financial planning profession

FPSB is the nonprofit, international standards-setting body for the global financial planning profession.

Excellence in financial planning

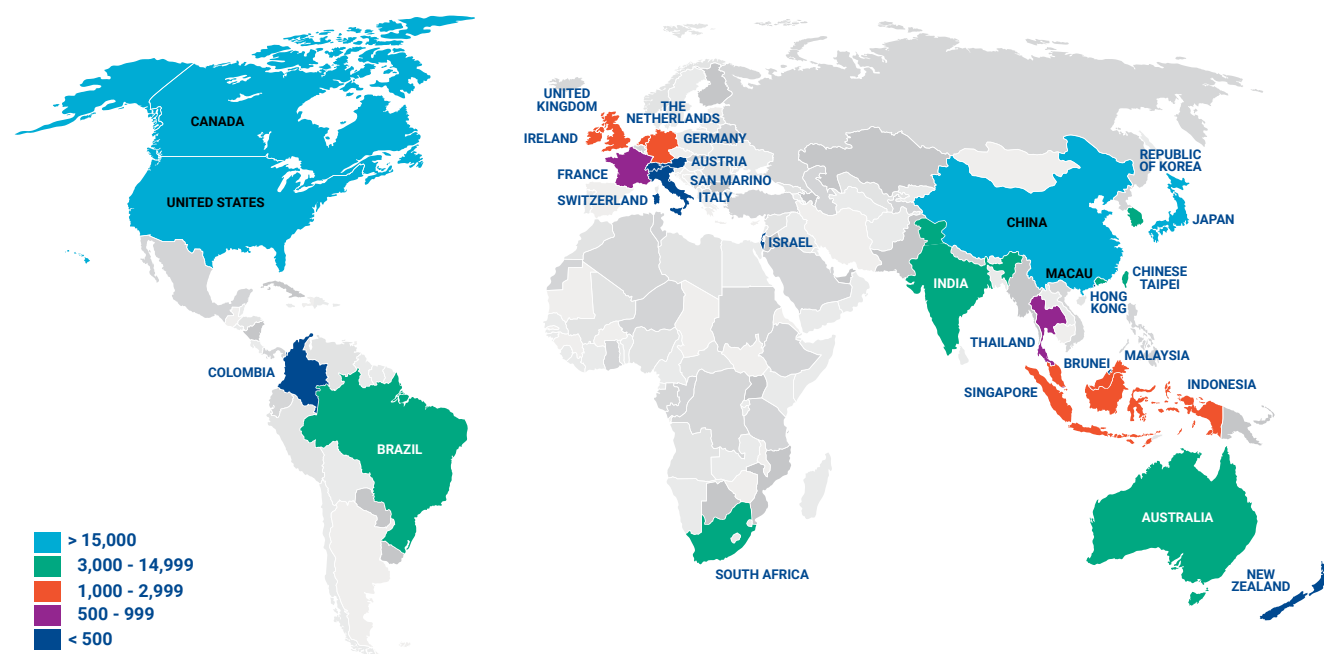
CFP certification is the global symbol of excellence in financial planning and represents financial planners with a shared commitment to rigorous international standards, ethical practices, and lifelong learning to better serve their clients.

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

*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.*

Global reach

Together with its global network of organizations, FPSB certifies **236,300 CFP professionals in 29 territories**.



FPSB's network of organizations spanning 29 territories

AUSTRALIA

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

AUSTRIA

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

BRAZIL

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

CANADA

CFP certification offered through:
FP Canada

PEOPLE'S REPUBLIC OF CHINA

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

CHINESE TAIPEI

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

COLOMBIA

CFP certification offered by:
Financial Planning Standards Board Ltd.

FRANCE

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

GERMANY

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

HONG KONG and MACAU

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

IRELAND

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

ISRAEL

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

ITALY and SAN MARINO

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

JAPAN

CFP certification offered through:
Japan Association for Financial Planners (JAFP)

MALAYSIA and BRUNEI

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

THE NETHERLANDS

CFP certification offered through:
Federatie Financieel Planners (FFP)

NEW ZEALAND

CFP certification offered through:
Financial Advice New Zealand (FANZ)

REPUBLIC OF KOREA

CFP certification offered by:
FPSB International Korea

SINGAPORE

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

SOUTH AFRICA

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

SWITZERLAND

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

THAILAND

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

UNITED KINGDOM

CFP certification offered through:
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

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

The Principles of Partnership articulate the collaboration between FPSB and its network of organizations to **strengthen, promote, and propel the global financial planning profession.**



FPSB Strategic Framework

			Long term objectives
F	Financial Planning Professionals	Grow the number of CFP professionals to position CFP certification as the designation of choice for the financial planning profession worldwide.	- Grow and retain CFP professionals by focusing on local, regional and global growth - Expand the number of territories where CFP certification is delivered - Increase the proportion of CFP professionals under 40 years of age - Improve the diversity of CFP professionals to reflect the public they serve
P	Partnerships	Partner with key stakeholders to strengthen the global financial planning profession and benefit the public.	- Harness the collective strength of the FPSB Network to lead the global CFP professional community - Work with financial services firms to increase their commitment to financial planning and CFP certification - Partner with key stakeholders in new territories to promote the financial planning profession and deliver CFP certification - Engage with international and local government agencies, consumer advocacy groups and professional bodies to increase recognition of the value of financial planning and improve access
S	Standards & Certification	Set, maintain and enforce global financial planning standards and CFP certification requirements to protect and serve the public, and advance the profession.	- Ensure the standards and certification requirements reflect evolving professional, academic and consumer needs - Achieve global consistency in the application of CFP certification - Develop and maintain global content for education, examination and professional development - Advance the CFP certification framework to reflect the evolving certification landscape
B	Brand & Awareness	Increase awareness of financial planning with CFP certification as its symbol of excellence, and position FPSB as the global leader of the profession.	- Increase public awareness and understanding of financial planning - Build public recognition of CFP certification to become synonymous with financial planning - Promote the value of CFP certification among professionals - Position FPSB as the global authority and voice of the profession