

Please use BLOCK CAPITALS, complete ALL sections of the application form, and ensure you SIGN and DATE the declaration or we will be unable to process your application. All applications are subject to assessment by FPSB Ireland Ltd prior to acceptance.

1: PERSONAL DETAILS

Forename(s):	Surname:
Title / prefix:	Date of birth: / /
Job title:	Employer / Company:
Company Address:	
Home address:	
Company phone:[]	Mobile:
Home phone: []	Fax: []
Mother's Maiden Name:	Place of birth:
Email:	

2: EDUCATION (ATTACH COPIES OF CERTS / RESULT TRANSCRIPTS)

Qualification	Year completed
<input type="checkbox"/> QFA	
<input type="checkbox"/> Graduate Diploma in Financial Planning	

3: CFP® CERTIFICATION EXAMINATION

	Month	Year
When did you complete the CFP certification examination?		

4: RECORD OF EXPERIENCE (Please attach)

- I have obtained appropriate and acceptable experience which has been documented on the attached record of experience and certified by appropriate persons with personal knowledge.

5. FEES

I agree to be bound by the licensing terms and conditions of FPSB Ireland Ltd (copy attached). An initial application fee of €307.50 (€250.00 + VAT @ 23%) is applicable. Renewals will be sent annually on 1st March for the following 12 month period at a cost of €307.50. **Please attach Payment Form and fees to this form.**

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CFP® CERTIFICATION RECORD OF EXPERIENCE

Completing the Record of Experience

As part of the process of applying for CFP® professional status, applicants must provide evidence of qualifying work experience. For guidance on qualifying work experience, please refer to FPSB Ireland's policy and related guidelines on the web-site www.fpsb.ie

Experience should be certified by appropriate persons with personal knowledge of the matters being certified.

Candidate Name:

CFP Examination Number:

Preferred Phone Contact:

Email address:

Record of Experience Start Date:

Record of Experience End Date:

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Please complete for each employment time period (if applicable)

CFP® CERTIFICATION RECORD OF EXPERIENCE

Position held: _____ Organisation: _____

Commencement date: _____ Finish up date (if applicable) _____

What category of experience was satisfied: _____

Please give a detailed account of your experience whilst in this role: _____

APPLICATION FOR
CERTIFIED FINANCIAL PLANNER™ Certification

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CFP® CERTIFICATION RECORD OF EXPERIENCE

Please give a detailed account of your experience whilst in this role (cont'd):

Certified by:

Job Title:

Organisation:

Phone No:

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DECLARATION

I have read the Articles of Association and Bye-Laws of Financial Planning Standards Board Ireland Limited (FPSB Ireland) and I understand the obligations arising under these. I agree to be bound by them and any amendment of them made from time to time.

I acknowledge and agree that permission to use the certification marks CFP®, Certified Financial Planner™ is granted by the Financial Planning Standards Board of Ireland Limited as the licensing authority for the CFP Marks in Ireland, through agreement with the Financial Planning Standards Board Ltd.

I accept that such certification is limited to a fixed period of time. At the end of the time period, if the certification is not renewed, the certification expires and any right to use the CFP Marks will terminate upon expiration of the certification but without prejudice to any rights FPSB Ireland Ltd may have against the applicant for any antecedent breaches of the Code of Ethics and Rules of Professional Conduct, and/or the misuse of the CFP Marks prior to the termination of the certification period. If the applicant fails to comply with certification renewal requirements, the applicant agrees to cease use of the CFP Marks immediately.

I declare that the information provided in this application is true and complete (in all material respects) and to the best of my knowledge and belief, having considered the Code of Ethics and Professional Responsibility as set out in Bye Law No. 2 and Article 44 of the FPSB Ireland Articles of Association (Liability to Disciplinary Action) there is no matter that, had I been a CFP Professional at that time would have given rise to a breach of this Bye-law and/or Article.

I understand that personal data relating to my CFP Certification will be used and disclosed by the Financial Planning Standards Board Ireland Limited for the purposes outlined in the Data Protection notice above. I confirm that I have read the contents of this notice and consent to the uses and disclosures of my personal data as set out therein.

Applicant's signature: _____

Date: / / _____

Please attach Payment Form and fees to this form.

How we process and manage your data - 30/05/2018

HOW WE PROCESS AND MANAGE YOUR DATA

We are committed to managing and protecting your personal data and as a CERTIFIED FINANCIAL PLANNER™ professional it is important that you know and understand how we do this.

With the **General Data Protection Regulation (GDPR)** coming into effect on Friday, 25th May, we have updated our [privacy policy](#) which sets out how we manage your data and we've outlined a brief overview below.

THE INFORMATION WE COLLECT

We process your personal information for the purposes of administering our relationship with you as a CERTIFIED FINANCIAL PLANNER™ professional and to provide you with our services such as managing and recording your events and/or training bookings, communicating with you about our activities and initiatives, and for related purposes.

We collect and store the following personal information which we have grouped together as follows:

- **Identity Data** (First name, last name, data of birth, gender, company, professional title, professional qualifications)
- **Contact Data** (Postal address, email address, telephone number)
- **Financial Data** (We do not store any financial information)

On occasion, photographers or videographers may capture your image at our events and we will always notify you if we are filming or recording at our events.

HOW WE USE YOUR PERSONAL INFORMATION

As a CERTIFIED FINANCIAL PLANNER™ professional your personal data is processed on the basis of contractual necessity and we require this information to perform our contractual relationship with you.

Your personal information, including contact information, is required to provide you with our services and we will not be able to offer our services without it.

The purposes and reasons for processing your personal data are detailed below:

- We collect your personal data for the purposes of administering our contractual relationship with you as a CERTIFIED FINANCIAL PLANNER™ professional
- We collect your personal data for the purposes of sharing information with you about our services and activities without distinction

We collect and store your personal data as part of our legal / contractual obligations.

SHARING YOUR INFORMATION

Third Parties

We take your privacy seriously and take every reasonable measure and precaution to protect and secure your personal data. We will not, without your consent, supply your data to any third party except where such a transfer is a necessary part of the activities that we undertake.

We use third-parties in some circumstances to provide certain services (e.g. Printing of Licenses, Administration of Exams) and third-parties who process your data on our behalf do so in accordance with our strict instructions.

HOW LONG WE KEEP YOUR INFORMATION

We will retain your information for the duration of your CERTIFIED FINANCIAL PLANNER™ professional license and for a period of six years thereafter. Depending on the nature of any ongoing relationship with you, this period of retention may be subject to change.

Upon termination of your license we will only retain some identity data associated with the granting of

How we process and manage your data - 30/05/2018

FIND OUT MORE

You have many rights under GDPR including the right to access any personal information that we process about you, the right to have any incomplete or inaccurate data to be corrected, as well as the right to request that we delete your information. For further information about our approach to protecting your data, view our [privacy policy](#).