

Guidelines for approval of events for financial planning CPD hours

A CERTIFIED FINANCIAL PLANNER™ professional demonstrates fulfilment of professional development obligations by engaging in learning activities that maintain and develop his or her abilities, skills, knowledge and professional conduct (**all specifically related to the activity of Financial Planning**) as described in FPSB Ireland's:

- Financial Planner Competency Profile
- Financial Planner Code of Ethics and Professional Responsibility
- Financial Planning Practice Standards.

The 5 hours CPD required by CFP® professionals to maintain their CFP certification annually must be related to the activity of financial planning* and approved by FPSB Ireland as meeting the standards required.

***FPSB Ireland has defined financial planning as follows;**

Financial Planning means the process of creating strategies, considering all relevant aspects of a client's financial situation, to manage financial affairs to meet the client's financial objectives and life goals.

FPSB Ireland accredits events for CPD hours in respect of *financial planning* as set out above. Events have to be formal and interactive in nature. Applications to have events approved for CPD hours will need to be supported in the following way:

1. Clearly demonstrate, with evidence, that the content of the CPD event relates to the practice of financial planning as defined by FPSB Ireland.
2. Provide evidence as to which of the areas of abilities, skills, knowledge and professional conduct (**all specifically related to the activity of Financial Planning**); as defined and documented by FPSB Ireland, have been developed through the event.
3. Provide evidence that the CPD event is substantially financial planning (as defined by FPSB Ireland) focused.
4. A completed application form along with the above criteria must be sent to FPSB Ireland either by post or email (cpd@fpsb.ie) to be approved for CPD hours. You will be advised by email that the event has / has not been approved for CPD hours.

Note: Situations where an event has a minor element of financial planning will not be considered for CPD hours for the financial planning element of a CFP professional's annual return.