

## **Canadian Securities Institute releases new Professional Competency Profile for Financial Planners**

*CSI continues to lead in applying best practices for financial services designations*

Toronto, July 10 2017 – The Canadian Securities Institute (CSI) is pleased to announce the launch of the latest *Personal Financial Planner (PFP)® Professional Competency Profile*, aligned with industry best practice and international credentialing standards. The PFP® Competency Profile describes the knowledge and skills applied by professionals awarded the PFP® designation.

“A robust and current competency profile is the foundation of all credible professional designations,” said Marie Muldowney, Managing Director at CSI. “We implemented a rigorous multi-phase process to develop this competency profile in order to fully encapsulate the role of personal financial planners.”

The PFP® Competency Profile defines what a financial planner can and should do. It drives the requirements for the prerequisite educational programs and necessary work experience, as well as the format and coverage of the Applied Financial Planning Certification Exam.

The new PFP® Competency Profile which builds upon the 2011 version was revised with significant input from PFP® designation holders and other industry stakeholders. This included one-on-one interviews with practicing financial planners, focus groups, and a large-scale survey of designation holders to validate the results of the development process. CSI also relied on the expertise of the PFP® Advisory Council, the volunteer body responsible for the oversight of the PFP® designation.

This process resulted in the PFP® Competency Profile featuring six technical and two enabling–competency groupings complemented by detailed knowledge statements.

Download the PFP® Professional Competency Profile [here](#).

### **About the Personal Financial Planner (PFP)® designation**

The Personal Financial Planner (PFP)® designation has been granted since 2011, when the previous designation (offered since 1996) was upgraded to meet international standards. Over 5,000 professionals have earned the PFP®. The PFP® is one of only three financial services credentials to meet the highest certification standards in North America (ISO 17024) granted by the American National Standards Institute. CSI ensures PFP® professionals have met the rigorous designation requirements and have committed to ongoing professionalism to maintain the PFP®.

### **About the Canadian Securities Institute**

The Canadian Securities Institute (CSI) is Canada’s leading provider of financial services education and credentials. Valued for its expertise in Canada and abroad, CSI offers more than 150 courses, such as the well-known Canadian Securities Course (CSC®), twelve certificate programs, popular specialized financial designations, such as [PFP®](#), [CIM®](#), [CIWM](#), [MTI®](#), and the Fellow of CSI ([FCSI®](#)). CSI operates as part of the Training and Certification arm of Moody's Analytics. For more information, please visit [www.csi.ca](http://www.csi.ca).

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