

## PFP® Graduation Celebration

Congratulations Class of 2020-2021!





### Meet The Presenters



MARIE MULDOWNEY

Host/Moderator

Managing Director

CSI & Moody's Analytics



STUART GRAY

CFP®, CIWM, FCSI®

**Guest Speaker** 

PFP® Council Chair

Director, Financial Planning
Centre of Expertise

RBC



CARISSA LUCREZIANO

CEP®

**Guest Speaker** 

PFP® Council Vice-Chair

Vice President, Financial and Investment Advice

**CIBC** 



## The PFP® Community

666

2020-2021 Graduates

5,719

Total PFP <sup>®</sup>s in Good Standing



2,671

**Total Badge Acceptances** 



## How to add your badge on your LinkedIn account

#### Step 1: Accept the Badge



Additional Details

#### Personal Financial Planner (PFP®)

Issued by Canadian Securities Institute

This digital credential indicates that the individual has completed the requirements to achieve the Personal Financial Planner (PFP®) designation. They possess the expertise and experience to develop robust financial plans tailored to each client's unique situation and providing them with financial advice. They are also adept at managing risk and developing and enhancing client relationships.

#### Skills

Asset And Liability Management	Investment Planning	Relationship Management
Retirement And Estate Planning	Tax Planning	

#### **Earning Criteria**

- Completed 445-610 hours of study
- Successfully passed two 3-hour proctored credentialing examination
- Met 3-year Experiential Requirement
- Annual adherence to the Code of Ethics and Continuing Education Requirements

#### Standards

#### ISO 17024 Accreditation

PFP® is 1 of only 3 financial services credentials to meet the highest certification standards in North America: ISO 17024 (granted by the American National Standards Institute in 2012). It acknowledges that CSI meets recognized global standards for certification bodies and PFP® letters meet rigorous requirements for competency and professionalism.

Step 2: Add the designation to your Licenses & Certifications section

Licenses & certifications



Personal Financial Planner (PFP®)

Canadian Securities Institute
Issued Nov 2021 · Expires Nov 2022

See credential



## Designation Governance

- » Chair
- » Vice-Chair
- » Council:
  - Financial Institutions
  - Education Partners
  - Independent Financial Planners
- » Ethics Committee



## PFP® Advisory Council Members

#### Marta Sadurska, CFP, PFP®, FCSI®

Investment Specialist / Financial Planner Servus Credit Union - Edmonton, AB

#### James G, Bilcox, CFP®, FMA, PFP®, CCS

Certified Financial Planner Sunlife Financial - Calgary, AB

#### Joshua Wong, PFP®

Investment Sales Manager
HSBC Global Asset Management Ltd. - Vancouver BC

#### Stuart Gray (Chair), PFP®, CFP®, CIWM, FCSI®

Director, FP Support & Practice Management RBC Royal Bank - Toronto ON

#### Carissa Lucreziano (Vice-Chair), PFP®, CFP®

Vice President - Financial and Investment Advice CIBC - Toronto, ON

#### Cristina Panaitescu-Rapan, PFP®

Senior Manager, Learning Programs Scotiabank - Toronto, ON

#### **Korinne Collins**

Vice President - Education & Events Canadian Credit Union Association - Toronto, ON

#### Maria Artuso, MBA, FCSI®, QAFP

Community Manager RBC Royal Bank - Milton, ON

#### Christine DiCarlo, MBA (Fin), CFP®, CIM®, FMA, FCSI®

Faculty (Business) Mohawk College - Hamilton, ON



## Importance of Financial Planning

Your role as a PFP® has never been more important in helping your clients have a plan!



## Award of Excellence Recipients



CIBC

**MUNISH GARG** 

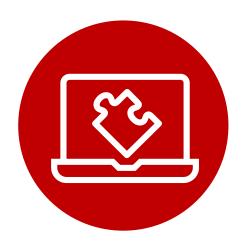


YUNYAN LIAO CIBC



ERNST BOXLER
CIBC

## Supporting our Designation Community







**WEBINARS** 



**GRADUATION** 



**GIVING BACK** 



# Congratulations!

View our 2020 – 2021 Graduating Class at csi.ca/pfp

For all questions, please email us at <a href="mailto:designations@csi.ca">designations@csi.ca</a>