



July 2017

## **1. Individual Exemptions and Equivalencies (Specific to PFP®)**

- An Academic Exemption Request form must be completed by the individual for each request
- Course content and evaluation details are to be provided for assessment purposes (e.g. tables of content or course syllabus)
- An original Course Transcript indicating successful completion of the course within the last 5 years must be submitted
- More than one Third party course may be assessed in order to achieve an academic exemption. For example, an individual who has taken two separate financial planning courses at a college, university or other educational organization may ask that both courses be applied for an academic exemption against one CSI course that covers both of these topics. In such a case, a course syllabus and tables of contents for the study materials from both courses are required for assessment purposes. Alternatively, if one course is submitted as being worth two academic exemptions, the individual will submit the administrative fee of \$100 and \$200 for the exemptions granted (\$100 for each exemption)
- Note: The Canadian Investment Fund Course offered through IFIC has a standing academic course exemption for Investment Funds In Canada due to regulatory licensing requirements and does not require submission of a course syllabus, but does require the administrative fee of \$100 and the \$100 exemption fee (\$200 total).
- Where a standing exemption has been approved, the \$100 administrative fee will be waived and individuals will be required to submit only the \$100 per academic exemption. (See next section on standing course exemptions.)

## **2. PFP Accreditation of Individual Courses by Third Party Providers**

- Standing academic course exemptions may be sought by Third Party providers of education
- Third Party providers of education or training programs must meet CSI academic and evaluation standards
- Standing exemptions are granted for a 3-year period
- Individual courses can be assessed at a fee of \$750
- Where a standing exemption has been approved, the \$100 administrative fee will be waived and individuals will be required to submit only the \$100 per exemption.



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### **3. Accreditation of Approved Routes to PFP Designation**

- Third Party providers of education or training programs must meet PFP<sup>®</sup> educational requirements as determined according to the PFP<sup>®</sup> Competency Profile and CSI academic standards.
- Approvals are granted for a 4-year period
  - A program assessment fee of \$2,500 plus taxes is required with the request from the provider with copies of all course materials and examination details and weightings aligned to the competencies as set out in the PFP<sup>®</sup> Competency Profile
- Where a route has been approved, the \$100 administrative fee will be waived and individuals will be required to submit only the \$100 per exemption.
- Assessment guidelines are applied during the review (a separate document)

#### **Documentation to be provided by Third Party Education Providers**

- Appropriate Fees
- Application for Approval of Route with route name
- Course Description(s)/Outlines - aligned to the PFP<sup>®</sup> Competencies
- Tables of Contents or copies of content (where required)
- Examination weighting, knowledge level requirements and length of examination
- Passing grade