

October 2016

We are delighted you are considering enrolment into the CFP® Certification Program. This document lists the accredited Bachelor and Postgraduate courses that qualify as an FPA “Approved Degree”.

To help you with your pathway toward CFP certification, there are a number of options. The courses highlighted in blue are currently accredited.

All other courses have achieved accreditation in the past and we will honour the accreditation if you have already started studies in one of these courses.

If you have completed your studies or are planning to study a course (or a combination of courses), which are not on the list, you can [apply for pre-admission](#). We can evaluate your particular course for entry into the CFP Certification program and let you know of any specific bridging requirement.

CFP® Certification Program Education Entry Requirements

An approved degree (exemptions may apply)

OR

A financial degree with a Diploma of Financial Planning or equivalent

OR

A non-related degree with an Advanced Diploma of Financial Planning or equivalent

OR

An Advanced Diploma of Financial Planning or equivalent and working towards your degree

OR

8 subjects from an approved Masters (Graduate Diploma)

Undergraduate degrees

The Bachelor degrees on this list (pages 2-4) automatically satisfy the education requirements to become a Financial Planner AFP® and prepare you for entry into the CFP® Certification program, without the need for a bridging program.

Postgraduate qualifications

If you do not hold an approved undergraduate degree but have industry experience, you can enrol into an approved postgraduate qualification. An FPEC-approved course will be a minimum of a Graduate Diploma. You can progress to a Masters degree to meet CFP Certification program entry (with exemptions for CFP 2, CFP 3 and CFP 4 in most cases) or add CFP 1, CFP 2, CFP 3 or CFP 4 to achieve a “Masters equivalent” to meet the degree requirement. Some education providers will allow you to count FPA study towards a Masters as “cross credits”.

Course exemptions for CFP 2 – 4 may apply, if you completed an approved postgraduate program less than 10 years ago and have a degree.

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BACHELOR DEGREES	
Education Provider	Bachelor Degree
Central Queensland University www.cqu.edu.au Prof Lee Di Milia	Bachelor of Financial Planning Bachelor of Financial Planning / Bachelor of Accounting Bachelor of Accounting (Financial Planning) Accredited for students commencing Aug 2009 – Dec 2014
Curtin University of Technology www.curtin.edu.au Dr Elson Goh	Bachelor of Commerce (Economics & Financial Planning) Accredited for students commencing Aug 2008 – Aug 2011
	Bachelor of Commerce (Financial Planning) Bachelor of Commerce (Accounting & Financial Planning) PLUS 326 Estate planning) Accredited for students commencing Aug 2011 – Dec 2018
Deakin University www.deakin.edu.au Dr Adrian Raftery CFP®	Bachelor of Commerce (major in financial planning) to 27 March 2012 Accredited for students commencing Mar 2008 – Dec 2012 Bachelor degree from 2012 including <ul style="list-style-type: none"> ▶ Fundamentals of Finance MAF101 ▶ Money and Capital Markets MAF 202 ▶ Financial Planning MAF 255 ▶ Superannuation Planning MAF 311 ▶ Advanced Financial Planning MAF312 ▶ Equities and Investment Analysis MAF 307 ▶ Principles of Income Tax Law MLC 301 ▶ Business Law MLC101 or Law in Business MLC201 Accredited for students commencing Dec 2012 – Dec 2014
	Bachelor degree including <ul style="list-style-type: none"> ▶ Building client relationships MAF 315/MAA 215 ▶ Estate Planning MAF 316/MAA 319 ▶ Fundamentals of Finance MAF101 ▶ Money and Capital Markets MAF 202 ▶ Financial Planning MAF 255/MAA 255 ▶ Superannuation Planning MAF 311/MAA 317 ▶ Advanced Financial Planning MAF 312/MAA 318 ▶ Equities and Investment Analysis MAF 307 ▶ Principles of Income Tax Law MLC 301 ▶ Business Law MLC101 Accredited for students commencing Jan 2015 – Jun 2017
Griffith University www.griffith.edu.au Prof Mark Brimble	Bachelor of Commerce (Financial Planning) Bachelor of Commerce (Professional) Financial Planning Bachelor of Commerce (Accelerated) Financial Planning Accredited for students commencing Mar 2009 – Feb 2018
La Trobe University www.latrobe.edu.au Dr Darren Henry	Financial Planning specialisation (7 subjects) within a full Bachelor degree Accredited for students commencing Mar 2009 – June 2018

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Education Provider	Bachelor Degree
RMIT University www.rmit.edu.au www.open.edu.au A/Pro Abdullahi Ahmed	Bachelor of Business (Economics and Finance) including the following subjects: <ul style="list-style-type: none"> ▶ Superannuation and Retirement Planning ▶ Insurance & Social Security ▶ Financial Planning Practice Management Accredited for students commencing Feb 2007 – Feb 2013
	Bachelor of Business (Financial Planning) through Open Universities Program (all Financial Planning subjects required) Accredited for students commencing Feb 2010 – Dec 2018
	BP314 Bachelor of Business (Financial Planning) Melbourne on campus 3 year degree (all financial planning subjects required)
	BP313 Bachelor of Business (Financial Planning) / Bachelor of Business (Accountancy) 4 year degree (all financial planning subjects required)
TAFE NSW Higher Education www.tafensw.edu.au Diana Bugarcic	Bachelor of Applied Finance (Financial Planning) Accredited for students commencing Jan 2012 – June 2019
University of Canberra www.canberra.edu.au Prof Milind Sathye	Bachelor of Commerce (Financial Planning major) Bachelor of Finance (Financial Planning major) Accredited for students commencing Sep 2010 – Dec 2017
University of New England www.une.edu.au A/Pro Martin Hovey	Bachelor of Financial Services and Bachelor of Laws Bachelor of Financial Services that must include: <ul style="list-style-type: none"> ▶ Financial Planning and Wealth Management (FIN102) ▶ Investment Management in Financial Planning (FIN103) ▶ Risk Management and Insurance (FIN201) ▶ Superannuation and Retirement (FIN202) ▶ Developing the Financial Plan (FIN301) Accredited for students commencing Jul 2011 – June 2014

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<p>University of New England www.une.edu.au A/Pro Martin Hovey</p>	<p>Bachelor of Business Bachelor of Accounting Bachelor of Business and Bachelor of Laws that must include:</p> <ul style="list-style-type: none"> ▶ Corporate Finance AFM231 ▶ Financial Planning and Wealth Management FIN200 ▶ Superannuation and Retirement FIN302 ▶ Investment Management in Financial Planning FIN303 ▶ Risk Management in Financial Planning FIN304 ▶ Developing the Financial Plan FIN305 ▶ Principles of Taxation Law LSSU392 ▶ Introduction to Business Law LSSU251 <p>Accredited for students commencing Jan 2016 – Dec 2018</p> <p>*Degree on teach out. From 2017, students can substitute units from other FPEC approved degrees.</p>
<p>University of the Sunshine Coast www.usc.edu.au Dr Gabrielle Parle</p>	<p>Bachelor of Commerce (Financial Planning)</p> <p>Accredited for students commencing Jan 2010 – Aug 2018</p> <p>(Named Bachelor of Commerce in 2012)</p>
<p>University of Wollongong www.uow.edu.au A/Pro Nelson Perera</p>	<p>Bachelor of Commerce (Financial Planning)</p> <p>Accredited for students commencing Sep 2008 – Jun 2014</p>
<p>Victoria University www.vu.edu.au A/Pro Nada Kulen</p>	<p>Bachelor of Business (Financial Risk Management)</p> <p>Accredited for students commencing Sep 2008 – Dec 2013</p>
<p>Western Sydney University www.westernsydney.edu.au Derek Gleeson</p>	<p>Bachelor of Financial Advising</p> <p>Accredited for students commencing Jan 2009 – Dec 2013</p>
	<p>Bachelor of Accounting with specialisations in financial planning and taxation</p> <p>Accredited for students commencing Jan 2016 – Dec 2018 who complete the degree with both specialisations</p>

POSTGRADUATE				
Education Provider	Qualification	FPEC -Approved Course (entry to program)	Requirements for FPA exemptions	Cross Credits
Charles Sturt University www.csu.edu.au Dr Dianne McGrath	Master of Applied Finance with studies in Financial Planning: <ul style="list-style-type: none"> ▶ Financial Planning (FIN560) ▶ Risk Management and Insurance (FIN562) ▶ Estate Planning (FIN563) ▶ Superannuation and Retirement Planning (FIN564) Accredited for students commencing Oct 2007 – Mar 2017	8 units as per FPEC bridging subjects list: <ul style="list-style-type: none"> ▶ FIN560 Financial Planning ▶ FIN562 Risk Management & Insurance ▶ FIN531 Investment Analysis ▶ FIN564 Superannuation & Retirement Planning ▶ LAW545 Taxation Strategies ▶ FIN563 Estate Planning ▶ FIN530 Money and capital Markets ▶ FIN516 Corporate Finance ▶ LAWS511 recommended 	Approved for exemptions for CFP 2 – 4 for full Masters degree including listed subjects	4 cross credits possible on individual application
Curtin University of Technology www.curtin.edu.au Dr Elson Goh CFP® LRS®	Master of Financial Planning Accredited for students commencing Jul 2004 - Dec 2014	<ul style="list-style-type: none"> ▶ Finance Principles 515 ▶ Finance Instruments and Markets 559 ▶ Personal Finance 520 ▶ Taxation 531 ▶ Personal Risk and Insurance 509 ▶ Estate Planning 526 ▶ Superannuation and Retirement Planning 621 ▶ Financial Plan Construction 519 	Approved for exemptions for CFP 2 – 4 for full Masters degree including listed subjects	4 cross credits available
Deakin University www.deakin.edu.au Dr Adrian Raftery CFP®	Master of Wealth Management Accredited for students from July 2004 who complete by end of 2011	Approved for entry to CFP program	Approved for exemptions for CFP 2 – 4 for full Masters degree completed by end of 2011	4 cross credits
	Master of Financial Planning Accredited for students commencing from Jan 2010 - Jun 2017 For Jan 2010 to Dec 2012 accreditation was for a Masters, including MAF765, MAF702, MAF707, MAF708 & MAF709	Minimum 8 units: <ul style="list-style-type: none"> ▶ MAF765 + MAA745 Financial Planning & Analysis/Financial Planning Fundamentals ▶ MPS701 Principles of Risk Management & Insurance ▶ MAF707 Investments and Portfolio Management ▶ MAF708 + MAA719 Retirement Income Streams/Superannuation and Retirement Planning ▶ MLC703 Principles of Income Tax Law ▶ MLC707 Commercial and Corporations Law ▶ MAF715 + MAA729 Estate Planning Strategies ▶ MAF709 + MAA727 Financial Planning Development ▶ MAF714 + MAA728 Managing Client Relationships 	Approved for exemptions for CFP 2 – 4 for full Masters degree including listed subjects	4 cross credits
Financial Services Institute of Australia (Finsia) c/- Kaplan	Graduate Diploma of Financial Planning Accredited for course completed by Dec 2008	Course approved for entry (with a Bachelors or Masters degree) Since 2014, an extra option is to combine this course with the CFP 1,2,3 & 4 as a "Masters equivalent"	Course approved for exemptions for CFP 2 – 4 (where held with a Bachelor or Master degree)	n/a

POSTGRADUATE				
Education Provider	Qualification	FPEC -Approved Course (entry to program)	Requirements for FPA exemptions	Cross Credits
Griffith University www.griffith.edu.au Prof Mark Brimble	Master of Business Administration (Financial Planning) Accredited for students commencing from July 2004 and completing by Dec 2012	Approved for entry with degree including <ul style="list-style-type: none"> ▶ 7202AFE Financial Planning ▶ 7232AFE Wealth management ▶ 7208AFE Financial Planning, Construction & Review ▶ 7214AFE retirement and Estate Planning 	Approved for exemptions for CFP 2 – 4 for full Masters degree	4 cross credits possible on individual application
	Master of Commerce (Financial Planning) Accredited for students commencing Jul 2004 -- Oct 2014	<ul style="list-style-type: none"> ▶ 7303AFE Economics ▶ 7202AFE Financial Planning ▶ 7203AFE Corporate Financial Risk Management ▶ 7151AFE Income Tax for Financial Planning ▶ 7108AFE Taxation Planning ▶ 7214AFE Retirement and Estate Planning ▶ 7232AFE Investment Analysis ▶ 7208AFE Financial Planning, Construction and Review 	Approved for exemptions for CFP 2 – 4 with 12 compulsory subjects	
	Master of Financial Planning Accredited for students commencing Oct 2014 – Oct 2017	<ul style="list-style-type: none"> ▶ 7254AFE Financial Planning Fundamentals ▶ 7256AFE Personal Risk Management ▶ 7232AFE Investments ▶ 7151AFE Taxation for Financial Planners OR 7106AFE Income Tax Law ▶ 7159AFE Principles of Business & Corporations Law ▶ 7255AFE Applied Financial Planning OR 7259AFE Financial Planning skills + AMP/Ethics Centre Program (AMP only) ▶ 7246AFE Behavioural Finance & Wealth Management ▶ 7214AFE Retirement and Estate Planning 	Approved for exemptions for CFP 2 – 4 with 12 compulsory subjects	
Kaplan Higher Education www.kaplanprofessional.edu.au Carly Francis	Graduate Diploma of Applied Finance (Financial Planning major) Completed by Dec 2010 Or Graduate Diploma of Financial Planning Accredited for students commencing Jan 2010 – Dec 2013	Approved for entry (with a Bachelor or Master degree) when including the following units: <ul style="list-style-type: none"> ▶ Financial Planning Fundamentals (FIN211) ▶ Investment Products (FIN212) ▶ Superannuation and Retirement Planning (FIN213) ▶ Insurance, Estate and Succession Planning (FIN214) 	Approved for exemptions for CFP 2 – 4 when completed with a Bachelor or Masters degree. Since Oct 2014, this Grad Dip can also be combined with CFP 1, CFP2, CFP3 and CFP4 to achieve a "Masters equivalent"	Students who have completed CFP Certification program are eligible for credits for FIN211, FIN212, FIN213 and FIN214.
	Master of Financial Planning Accredited for students commencing Jan 2014 – Feb 2018	<ul style="list-style-type: none"> ▶ FPC002 Applied Financial Planning ▶ FPC004 Insurance Advice ▶ FPC008 Investment Management: Fund management Perspective ▶ FPC003 Superannuation and Advice ▶ FPC006 Tax Considerations in Financial Advice ▶ FPC005 Estate and Succession Planning ▶ FPC009 Complex Financial Planning ▶ FPC007 Client Engagement Skills 	Approved for exemptions for CFP 2 – 4 with a 12 subject Masters that includes FPEC study and: <ul style="list-style-type: none"> ▶ FPE011 Debt Strategies ▶ FPE016 Self managed Superannuation Funds 	Credit for 6 units available for completion of a degree + CFP Certification program or 4 units in Kaplan pathway.

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Education Provider	Qualification	FPEC -Approved Course (entry to program)	Requirements for FPA exemptions	Cross Credits
La Trobe University www.latrobe.edu.au Dr Darren Henry	Masters degree containing 9 specified subjects Accredited for students commencing Mar 2009 – Dec 2014	<ul style="list-style-type: none"> ▶ Principles of Economics ▶ Principles of Finance ▶ Financial Planning ▶ Retirement and Estate Planning ▶ Case Studies in financial planning ▶ Portfolio Management ▶ Debt securities ▶ Equity securities 	Approved for exemption to CFP 4	n/a
University of Adelaide www.adelaide.edu.au	Masters degrees and Graduate Diplomas that include Financial Planning Specialisation Accredited for students commencing Mar 2006 – Dec 2012	Graduate diploma (when combined with a Bachelor or Masters degree) that include four Financial Planning Specialisation: <ul style="list-style-type: none"> ▶ Tax, Estate and Wealth Planning (CORPFIN 6003) ▶ Investment Advisory Process and Client Relationship Management (CORPFIN 6005) ▶ Industry Research Project (CORPFIN 6000) ▶ Global Wealth Management (CORPFIN 6004) 	Approved for exemptions for CFP 2 – 4 when completed with a Bachelor or Masters degree. Since Oct 2014, the Grad Dip can also be combined with CFP 1, CFP2, CFP3 and CFP4 to achieve a “Masters equivalent”.	n/a
University of New England (UNE) www.une.edu.au A/Prof Martin Hovey	Master of Financial Services or Grad Dip (Financial Services) Accredited for students commencing May 2011-Jun 2014	Master of Financial Services or Graduate diploma (when combined with a Bachelor or Masters degree) that include: <ul style="list-style-type: none"> • Financial Planning and Wealth Management (GSB608) • Investment Management in Financial Planning (GSB611) • Risk Management and Insurance (GSB609) • Superannuation and Retirement (GSB610) • Developing the Financial Plan (GSB612) 	Approved for exemptions for CFP 2 – 4 when completed within a Graduate Diploma or Masters qualification. A Grad Dip must be held with a degree or combined with CFP 1, CFP2, CFP3 and CFP4 to achieve a “Masters equivalent”.	4 cross credits
	Master of Financial Services Accredited for students commencing Dec 2014-Dec 2018	<ul style="list-style-type: none"> ▶ AFM465/AFM565 Financial Planning and Wealth Management ▶ AFM466 Risk Management and Insurance ▶ AFM467 Superannuation and Retirement ▶ AFM468 Investment Management in Financial Planning ▶ AFM569 Developing the Financial Plan ▶ LSSU592 Taxation Law ▶ LSSU450 Commercial Law 1: Principles of Australian Law OR LSSU591 Law of Commercial Associations ▶ AFM432/AFM442 Financial Instruments and Markets <p>*Masters on teach out. From 2017, students can substitute units from other FPEC approved masters.</p>	Exemption for CFP4 for: <ul style="list-style-type: none"> ▶ AFM532 Security Analysis and Portfolio Management (i.e. beyond listed subjects)	4 cross credits



POSTGRADUATE				
Education Provider	Qualification	FPEC -Approved Course (entry to program)	Requirements for FPA exemptions	Cross Credits
University of NSW www.unsw.edu.au Kingsley Fong	Master of Financial Planning Approved units on Estate Planning and Insurance are mandatory for students commencing from 2014. Accredited for students commencing Oct 2011 – Dec 2016	<ul style="list-style-type: none"> ▶ FINS5510 Per. Financial Planning & Management ▶ FINS5531 Risk and Insurance ▶ FINS5513 Investments & Portfolio Selection ▶ ACTL5401 Retirement Planning ▶ TABL5527 Tax Strategies in Fin Planning ▶ TABL5511 Legal Foundations of Business ▶ FINS5539 Estate Planning, Succession & Asset Protection ▶ FINS5512 Financial Markets and Institutions 	Approved for exemptions for CFP2, CFP3 and CFP4 for 12 subject Masters	1 credit for completed CFP designation 1 credit for CFP 2, 3, and 4 completed within 3 years Total of 2 credits
University of Southern Queensland www.usq.edu.au Lujer Santacruz	Master of Business (Personal Financial Planning Specialisation) Graduate Diploma of Business (Personal Financial Planning) Accredited for students commencing Jul 2004 – Nov 2011	Masters approved. Grad Dip approved for entry with a Bachelor or Master degree. Since Oct 2014, the Grad Dip can also be combined with CFP 1, CFP2, CFP3 and CFP4 to achieve a "Masters equivalent".	Approved for exemptions for CFP2, CFP 3 and CFP 4 for minimum Grad Dip.	Individual applications
University of the Sunshine Coast www.usc.edu.au Dr Gabrielle Parle	Graduate Diploma of Financial Planning and Master of Financial Planning Accredited for students commencing Jul 2004 – Nov 2011	Grad Dip approved for entry with a Bachelor or Master degree. Since Oct 2014, the Grad Dip can also be combined with CFP 1, CFP2, CFP3 and CFP4 to achieve a "Masters equivalent".	Approved for exemptions for CFP2, CFP 3 and CFP 4 for minimum Grad Dip.	Individual applications
Western Sydney University www.westernsydney.edu.au Derek Gleeson	Master of Commerce (Financial Planning) Accredited for students commencing Jul 2004 – Dec 2014	8 compulsory subjects	Approved for exemptions for CFP2, CFP 3 and CFP 4 for 8 subjects	2 cross credits towards 8 unit Masters
	Master of Commerce (Financial Planning) / Master of Financial Planning Accredited for students commencing Jan 2015 – Dec 2017	<ul style="list-style-type: none"> ▶ 200866 Principles of Financial Planning ▶ 200870 Insurance and Risk Management ▶ 200868 Investment Planning ▶ 200867 Superannuation ▶ 200869 Principles of Taxation ▶ 200432 Commercial law ▶ 200871 Planning for Retirement ▶ Research Project or Internship 	Approved for exemptions for CFP2, CFP 3 and CFP 4 for 12 units including listed subjects	3 cross credits towards 12-unit Masters: ▶ 200866 ▶ 200868 ▶ 200817