



CFP® CERTIFICATION PROGRAM

Application to enrol

Semester 1 2019

Please send your completed form to:

Education, Financial Planning Association, GPO Box 4285, Sydney NSW 2001 or email enrolments@fpa.com.au

1. APPLICATION DETAILS

FPA Member ID:

2. PERSONAL DETAILS

Title:

First name:

Middle name:

Surname:

DOB:

Email:

Contact number:

Mailing address for your unit material:

Number & Street:

Suburb:

State:

Postcode:

3. WORK DETAILS

Company:

Job title:

ASIC Financial Adviser Register Number:

Licensee:

FPA Professional Practice/Partner name:

4. WHAT PROMPTED YOU TO ENROL?

FPA Express

FPA Website

FPA Email

Work colleague

Licensee/Employer

FPA Magazine

Re-enrolment

Repeat

5. UNIT SELECTION

Unit	Options	Cost	Select	Dates	Exam location
CFP 1	New - No advanced standing	\$1600	<input type="checkbox"/>	Assignment: 8 May	n/a
	New - advanced standing (from CFP 2 - CFP 4)	\$1600	<input type="checkbox"/>		
	Repeat	\$1100	<input type="checkbox"/>		

CFP 2	New	\$1600	<input type="checkbox"/>	Assignment: 10 April Exam: 14 May Online test week prior to exam	<input type="checkbox"/> Adelaide <input type="checkbox"/> Brisbane <input type="checkbox"/> Canberra <input type="checkbox"/> Hobart <input type="checkbox"/> Melbourne <input type="checkbox"/> Sydney <input type="checkbox"/> Perth <input type="checkbox"/> Remote*
	Repeat all	\$1300	<input type="checkbox"/>		
	Repeat assignment	\$1100	<input type="checkbox"/>		
	Repeat exam	\$1100	<input type="checkbox"/>		

CFP 3	New	\$1600	<input type="checkbox"/>	Assignment: 10 April Exam: 14 May Online test week prior to exam	<input type="checkbox"/> Adelaide <input type="checkbox"/> Brisbane <input type="checkbox"/> Canberra <input type="checkbox"/> Hobart <input type="checkbox"/> Melbourne <input type="checkbox"/> Sydney <input type="checkbox"/> Perth <input type="checkbox"/> Remote*
	Repeat all	\$1300	<input type="checkbox"/>		
	Repeat assignment	\$1100	<input type="checkbox"/>		
	Repeat exam	\$1100	<input type="checkbox"/>		

CFP 4	New	\$1600	<input type="checkbox"/>	Assignment: 8 May	n/a
	Repeat	\$1100	<input type="checkbox"/>		

CFP Certification	Please select:			1 semester <input type="checkbox"/>	1 year <input type="checkbox"/>	
	New	\$1600	<input type="checkbox"/>	1 semester Observation: 10 April Assignment: 24 April Exam: 14 May 1 year Observation: 10 April Assignment: 24 April Exam: 1 October	<input type="checkbox"/> Adelaide <input type="checkbox"/> Brisbane <input type="checkbox"/> Canberra <input type="checkbox"/> Hobart <input type="checkbox"/> Melbourne <input type="checkbox"/> Sydney <input type="checkbox"/> Perth <input type="checkbox"/> Remote*	
	Repeat all	\$1300	<input type="checkbox"/>			
	Repeat assignment	\$1100	<input type="checkbox"/>			
	Repeat exam	\$1100	<input type="checkbox"/>			

*Select Remote if you are more than 150kms from the cities listed.

ONLY COMPLETE THIS PAGE IF YOU ARE NEW TO THE PROGRAM

6. EXPERIENCE REQUIREMENTS

Please tick the box to confirm that you have met the experience requirements and **supplied proof of experience**.

FOR ENTRY (CFP 1 - 4)

12 months minimum experience or completed an FPA approved degree

7. EDUCATION PATHWAY

(Please tick your pathway into the CFP Certification Program, complete the table below and **supply academic transcripts**)

- Pre-admission approval letter
- An FPA Approved Degree (please refer to the FPA Approved Degree List available at www.fpa.com.au)
- A financial degree with a Diploma of Financial Planning (meeting RG146)
- A non-related degree with an Advanced Diploma of Financial Planning (meeting RG146)
- A Graduate Diploma
- An Advanced Diploma of Financial Planning (that meets the RG146 requirements) and working towards your degree.
You will not receive your designation until you have completed your degree

Title of Degree	Awarding Institution	Date of completion

8. ADVANCED STANDING (tick the appropriate box and complete the table below)

Advanced standing is only approved for completed post graduate or masters qualifications, not for individual postgraduate subjects. Advanced standing only applies to CFP 2, CFP 3 and CFP 4. Please review the FPA Approved Degree list available at www.fpa.com.au.

Please tick the appropriate box and complete the table below.

- FPA Approved Degree (please refer to the FPA Approved Degree List available at www.fpa.com.au)
- CPA – Financial Planning Specialist (accountants must have the specialist designation in financial planning)
- CA – Financial Planning Specialist (accountants must have the specialist designation in financial planning)

9. FOR CFP CERTIFICATION STUDENTS ONLY

FOR CFP C and CFP MEMBERSHIP

12 months minimum Authorised Representative experience, within the last five years

Current Job Title:

Duration:

Previous Job Title:

Duration:

10. STUDENT DECLARATION

I acknowledge that I have read and understood the FPA Privacy Statement/Privacy Policy, as amended from time to time. I acknowledge that in the course of the FPA's activities, the FPA will collect, hold, store, use and disclose my personal information, both within Australia and overseas, in accordance with and for the purposes outlined in the FPA Privacy Policy, and I consent to this collection, holding, storage, use and disclosure contained in this Application Form, and during the term of my membership (if approved).

I hereby declare that the statements made in this application are complete and records supplied are true at the time of applying for the CFP Certification Program. I consent to the collection, use and disclosure of any information provided in this form and otherwise held or acquired by FPA in accordance with and for the purposes outlined in the Student Privacy Statement contained within the CFP Certification Program Handbook. I have read and agree to all the policies, procedures, and rules as outlined in the CFP Certification Program Handbook as well as those on the FPA website www.fpa.com.au.

Your signature:

Date:

11. PAYMENT

(Please note for CFP 1 - CFP 4 only, prices include GST for Tax Invoice ABN 62 054 174 453)

If you are employed by an FPA Professional Partner or FPA Professional Practice, you receive a 10% preferential discount on **new enrolments** only. This is not available for repeat students. Please list your Professional Partner or Professional Practice name in the applicable box. (If this is not selected, there is no discount applied)

Unit cost:

\$

Less 10% discount (if applicable):

\$

FPA Professional Practice/Partner name (if applicable):

Total fee which I hereby authorise the FPA to debit from my credit card

Total fee \$

Card type:

Visa

MasterCard

Amex

Card number:

CCV:

Expiry date:

Cardholder's name:

Cardholder's signature:

Date:

Who is paying for your CFP Certification Program enrolment?

Yourself

Your licensee

Your practice

Partially funded



FINANCIAL PLANNING
ASSOCIATION OF AUSTRALIA



Request for special arrangements

I have a disability that may affect my ability to write the exam under standard conditions (see *Special Needs in the CFP Certification Program Handbook*)

12. PRIVACY

The FPA is committed to ensure the personal information of all members are collected, used, handled, stored and disclosed in compliance with the Privacy Act 1988 (Cth) (Privacy Act) and the Australian Privacy Principles (APPs).

The FPA's Privacy Statement (also referred to as Privacy Policy) (available online at www.fpa.com.au/privacy, or upon request) outlines the way in which the FPA will comply with the obligations under the Privacy Act, including an outline on the kind of personal information that will be collected and held, how personal information is collected and held, the purpose of the collection of personal information, how an individual can access personal information and the way in which the FPA will store and disclose personal information.

In the course of FPA activities, the FPA collects and holds personal information. Please be aware that the main purposes for collecting that personal information include those set out in FPA's Privacy Statement. Please ensure that you read this Privacy Statement prior to completing this form.

13. STUDENT CHECKLIST

Please ensure that you have completed the enrolment form and attached all relevant documentation. The checklist below is for your use. Please note that we cannot process any enrolment unless the enrolment form is complete and you have attached certified copies of all relevant documents.

Provided FPA Member ID on form

Attached copies of Academic Transcript(s), if required

Evidence of experience, if required

Completed and signed payment section

Signed Student Declaration