

We are delighted you are considering enrolment into the CFP® Certification Program. To help you with your pathway toward CFP Certification, here are the education entry requirements. If you have completed your studies or are planning to study a course (or a combination of courses) which does not appear on the FASEA list, you can [apply for New Admission](#).

## CFP® Certification Program Education Entry Requirements

A FASEA-approved academic degree (advanced standing may apply) listed in the [Relevant Providers Degrees, Qualifications and Courses Standard Determination](#) released by FASEA.

These include bachelor degrees, graduate diplomas and master degrees

OR

\*An Australian financial degree with a Diploma of Financial Planning or (RG 146) equivalent

OR

\*A non-related international 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

Have completed eight (8) subjects from a FASEA-approved Master degree (Graduate Diploma)

*\*Education pathway valid until 2024*

OR

Enrolled in an Integrated Masters + CFP Program with a partner institution

### Undergraduate degrees

All bachelor degrees listed in FASEA's Relevant Providers Degrees, Qualifications and Courses Standard Determination 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 enroll into an approved postgraduate qualification. A FASEA-approved course will be a minimum of a Graduate Diploma. You can progress to a Masters degree to meet CFP Certification program entry (with advanced standing 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".

## Recognition of Prior Learning and the CFP® Certification Program

The FPA provides recognition of prior learning into the CFP Certification program to individuals who are able to demonstrate the likelihood of successfully achieving the CFP Certification outcomes AND provide evidence of either:

- FASEA-approved postgraduate learning
- completion of coursework to attain a Professional Designation

The FPA **will not** provide RPL for.

- Work experience
- Financial planning education qualifications below an AQF level 8 Graduate Diploma
- Non-financial planning / finance-related postgraduate qualifications

If you hold a FASEA-approved postgraduate degree, you may be eligible for advanced standing for FPA's technical units of CFP 2, 3 and 4 units. Advanced standing is available for CFP 1 if you have successfully completed a FASEA-approved Ethics Bridging Course AND have completed the FPA's Know Your Code Online Module. No advanced standing is available for the final CFP Certification unit.

Exemptions for the CFP1, CFP 2, CFP 3 and CFP 4 are only available for postgraduate studies. The FPA reserves the right to refuse exemptions based on exemptions e.g. where the exemptions are not based on completion of postgraduate subjects completed.

## Obtaining RPL into the CFP Certification Program units

### CFP 1 FPA Professionalism

Students who have completed either a:

- FASEA-approved Ethics Bridging course OR
- Ethics unit in a current, FASEA-approved postgraduate degree

will be given RPL for CFP 1 unit, provided they complete the FPA's Know Your Code Online module.

### CFP 2 Applied Strategies 1

Students are able to receive RPL into CFP 2 if they:

- Completed all the relevant units of a FASEA-approved postgraduate degree with an RPL agreement with FPEC will be given RPL for CFP 2
- Completed the specified units of a FASEA-approved postgraduate degree to receive RPL into CFP or CFP 3 (see List of Required Units to Receive RPL for CFP 2, 3 and 4)
- Are a current member of CPA Australia / Institute of Chartered Accountants in Australia and have completed their professional financial planning specialisation education requirement and hold the designation.

### **CFP 3      Applied Strategies 2**

Students are able to receive RPL into CFP 3 if they:

- Completed all the relevant units of a FASEA-approved postgraduate degree with an RPL agreement with FPEC will be given RPL for CFP 3
- Completed the specified units of a FASEA-approved postgraduate degree to receive RPL into CFP or CFP 3 (see List of Required Units to Receive RPL for CFP 2, 3 and 4)
- Are a current member of CPA Australia / Institute of Chartered Accountants in Australia and have completed their professional financial planning specialisation education requirement and hold the designation.

### **CFP 4      Investment Strategies**

Students are able to receive RPL into CFP 4 if they:

- Completed all the relevant units of a FASEA-approved postgraduate degree with an RPL agreement with FPEC will be given RPL for CFP 4
- Successfully completed the Certified Investment Management Analyst (CIMA certification and hold the designation
- Successfully completed the Certified Financial Analyst (CFA) certification and hold the designation
- Are a current member of CPA Australia / Institute of Chartered Accountants in Australia and have completed their professional financial planning specialisation education requirement and hold the designation.

### **CFP Certification Unit**

RPL is not available for CFP Certification Unit. Should the candidate enter the program through the CFP cross border arrangement, the candidate only needs to take the CFP Certification examination.

### **Students with 'Related' postgraduate degrees**

Students with 'related' postgraduate degrees may gain RPL into CFP 4. To be awarded RPL for CFP 4, the student must:

- Request their education provider to map relevant completed postgraduate subjects to CFP 4. Contact [education@fpa.com.au](mailto:education@fpa.com.au) for more information on this.
- Submit the completed mapping together with the relevant subject guides. Note that evidence of completion must still be presented.

Once submitted, the FPA will forward the submitted documents to FPEC for determination.

**NOTE:** Attempting the CFP C unit becomes significantly difficult if you receive RPL for any of the CFP certification units. The chances of failing the CFP C unit is higher for those who received RPL for CFP 1 to 4 than those who have attempted the other units.

## Approved Degree List

The graduates of the following FASEA-approved programs will receive advanced standing for CFP 2, 3 and 4 units. To gain advanced standing, you must complete (via course work) ALL mandatory units/subjects listed below. You may also refer to the [Relevant Providers Degrees, Qualifications and Courses Standard Determination](#) for further information.

Education Provider	Qualification
<p style="text-align: center;"><b>Australian Catholic University</b></p>	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2023</i></p> <ul style="list-style-type: none"> <li>• BAFN605 Estate Planning and Capstone Project</li> <li>• BAFN608 Financial Planning</li> <li>• BAFN609 Risk Management and Insurance</li> <li>• BAFN610 Responsible Investment Management</li> <li>• BAFN612 Superannuation and Retirement <i>previously BAFN600 Finance and Quantitative Methods</i></li> <li>• LEGL601 Commercial and Corporations Law</li> <li>• LEGL602 Taxation Law</li> <li>• MGMT638 Ethical Leadership</li> </ul>
	<p><b>Master of Finance major in Financial Planning / Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2023</i></p> <ul style="list-style-type: none"> <li>• BAFN605 Estate Planning and Capstone Project</li> <li>• BAFN608 Financial Planning</li> <li>• BAFN609 Risk Management and Insurance</li> <li>• BAFN610 Responsible Investment Management</li> <li>• BAFN612 Superannuation and Retirement <i>previously BAFN600 Finance and Quantitative Methods</i></li> <li>• LEGL601 Commercial and Corporations Law</li> <li>• LEGL602 Taxation Law</li> <li>• MGMT638 Ethical Leadership</li> </ul>

Education Provider	Qualification
<p style="text-align: center;"><b>Central Queensland University</b></p>	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced before Semester 2, 2020</i></p> <ul style="list-style-type: none"> <li>• LAWS20060 Taxation Law of Australia</li> <li>• FINC20029 Financial Advice and Corporations Law</li> <li>• FINC20024 Professional Advice Project (Capstone)</li> <li>• FINC20026 Superannuation and Wealth Planning</li> <li>• FINC20027 Retirement and Estate Planning</li> <li>• FINC20028 Risk Management and Insurance</li> <li>• FINC20030 Behavioural Finance and Client Relationships</li> <li>• FINC20031 Ethical Financial Planning Practice</li> </ul> <p><i>Note: Course no longer offered as of Semester 2, 2020</i></p>
	<p><b>Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced before Semester 2, 2020</i></p> <ul style="list-style-type: none"> <li>• FINC20025 Financial Planning Practice</li> <li>• FINC19019 Taxation Law of Australia</li> <li>• FINC20026 Superannuation and Wealth</li> <li>• FNC20028 Risk Management and Insurance</li> <li>• LAWSA19833 Australian Commercial Law</li> <li>• FINC20027 Retirement and Estate Planning</li> <li>• FINC20019 Money and Capital Markets</li> <li>• FINC20024 Professional Advice Project</li> <li>• FINC20030 Behavioural Finance</li> <li>• FINC20031 Ethical Financial Planning Practice</li> <li>• FINC20019 Financial Advice &amp; Corporations Law</li> </ul> <p><i>Note: Course no longer offered as of Semester 2, 2020</i></p>
<p style="text-align: center;"><b>Charles Sturt University</b></p>	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• FIN531 Investment Analysis</li> <li>• FIN560 Financial Planning</li> <li>• FIN562 Risk Management and Insurance</li> <li>• FIN563 Estate Planning</li> <li>• FIN564 Superannuation and Retirement Planning</li> <li>• FIN572 Professional Ethics and Contemporary Financial Planning</li> <li>• LAW523 Finance Law / LAW504 Business and Corporations Law</li> <li>• LAW545 Taxation Strategies</li> </ul>
	<p><b>Master of Applied Finance</b></p> <p><i>Advanced standing arrangement available for students who commenced on or before Semester 2, 2019</i></p> <ul style="list-style-type: none"> <li>• FIN560 Financial Planning</li> <li>• FIN562 Risk Management and Insurance</li> <li>• FIN563 Estate Planning</li> <li>• FIN564 Superannuation and Retirement Planning</li> <li>• FIN531 Investment Analysis</li> <li>• LAW545 Taxation Strategies</li> <li>• FIN530 Money and Capital Markets</li> <li>• FIN516 Corporate Finance</li> </ul>

Education Provider	Qualification
<p><b>Charles Sturt University</b></p>	<p><b>Master of Applied Finance (Financial Planning)</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• FIN560 Financial Planning</li> <li>• FIN516 Corporate Finance</li> <li>• FIN531 Investment Analysis</li> <li>• FIN562 Risk Management and Insurance</li> <li>• FIN563 Estate Planning</li> <li>• FIN564 Superannuation and Retirement Planning</li> <li>• FIN572 Professional Ethics and Contemporary Financial Planning*</li> <li>• LAW523 Finance Law / LAW504 Business and Corporations Law</li> <li>• LAW545 Taxation Strategies</li> </ul> <p><i>*NOTE: Students who completed FIN572 <b>after 01 July 2019</b> will receive advanced standing for the CFP 1 FPA Professionalism unit.</i></p>
<p><b>Curtin University of Technology</b></p>	<p><b>Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced on or before Semester 2, 2014</i></p> <ul style="list-style-type: none"> <li>• Finance Principles 515</li> <li>• Finance Instruments and Markets 559</li> <li>• Personal Finance 520</li> <li>• Taxation 531</li> <li>• Personal Risk and Insurance 509</li> <li>• Estate Planning 526</li> <li>• Superannuation and Retirement Planning 621</li> <li>• Financial Plan Construction 519</li> </ul>
<p><b>Deakin University</b></p>	<p><b>M669 Graduate Diploma in Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced from Semester 1, 2019 and to Semester 2, 2021</i></p> <ul style="list-style-type: none"> <li>• MAF714/MAA728 Managing Client Relationships /Financial Behaviour and Decision Making</li> <li>• MAF765/MAA745 Financial Planning and Economic Fundamentals</li> <li>• MAA700 Estate Planning and Risk Management Strategies</li> <li>• MAA719 Superannuation and Retirement Planning</li> <li>• MLC707 Commercial and Corporations Law/Business Law</li> <li>• MAF707 Investments and Portfolio Management</li> <li>• MLC703 Principles of Income Tax Law</li> <li>• MLM717 Financial Services Regulation</li> </ul> <p><i>Advanced standing arrangement available for students who commenced from Semester 1, 2017 and before Semester 1, 2019</i></p> <ul style="list-style-type: none"> <li>• MAF714/MAA728 Managing Client Relationships /Financial Behaviour and Decision Making</li> <li>• MAF765/MAA745 Financial Planning and Economic Fundamentals</li> <li>• MAA700 Estate Planning and Risk Management Strategies</li> <li>• MAF708/MAA719 Retirement Income Streams / Superannuation and Retirement Planning</li> <li>• MLC707 Commercial and Corporations Law/Business Law</li> <li>• MAF707 Investments and Portfolio Management</li> <li>• MLC703 Principles of Income Tax Law MAF709/MAA727 Financial Planning Development</li> </ul>

Education Provider	Qualification
<p style="text-align: center;"><b>Deakin University</b></p>	<p><b>M669 Graduate Diploma in Financial Planning / Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• MAF765/MAA745 Financial Planning and Economic Fundamentals</li> <li>• MPS701/MAS701/MAA746 Principles of Risk Management and Insurance</li> <li>• MAF708/MAA719 Retirement Income Streams / Superannuation and Retirement Planning</li> <li>• MLC707 Commercial and Corporations Law / Business Law</li> <li>• MAF707 Investments and Portfolio Management</li> <li>• MLC703 Principles of Income Tax Law</li> <li>• MAF709/MAA727 Financial Planning Development</li> <li>• MAF702 Financial Markets</li> </ul> <p><i>Advanced standing arrangement available for students who commenced from Semester 1, 2015 and to Semester 2, 2017</i></p> <ul style="list-style-type: none"> <li>• MAF765/MAA745 Financial Planning and Analysis/Financial Planning Fundamentals/Financial Planning and Economic Fundamentals</li> <li>• MPS701/MAS701/MAA746 Principles of Risk Management and Insurance</li> <li>• MAF707 Investments and Portfolio Management</li> <li>• MLC703 Principles of Income Tax Law</li> <li>• MAF702 Financial Markets</li> <li>• MAF708/MAA719 Retirement income Streams / Superannuation and Retirement</li> </ul>
	<p><b>M683 Graduate Diploma of Financial Services</b></p> <p><i>Advanced standing arrangement available for students who commenced from Semester 1, 2006 and to Semester 2, 2010</i></p> <ul style="list-style-type: none"> <li>• MPS701/MAS701/MAA746 Principles of Risk Management and Insurance</li> <li>• MAF708/MAA708 Retirement Income Streams / Superannuation and Retirement Planning</li> <li>• MAF707 Investments and Portfolio Management</li> <li>• MLC703 Principles of Income Tax Law</li> <li>• MAF702 Financial Markets</li> <li>• MAF709/MAA727 Financial Planning Development</li> <li>• MP1753/MPF753 Finance</li> <li>• MPA711 Corporate Governance and Ethics</li> </ul> <p><i>Advanced standing arrangement available for students who commenced from Semester 1, 2010 and to Semester 2, 2014</i></p> <ul style="list-style-type: none"> <li>• MAF765 Financial Planning and Analysis</li> <li>• MPS701/MAS701/MAA746 Principles of Risk Management and Insurance</li> <li>• MAF708/MAA708 Retirement Income Streams / Superannuation and Retirement Planning</li> <li>• MAF707 Investments and Portfolio Management</li> <li>• MLC703 Principles of Income Tax Law</li> <li>• MAF702 Financial Markets</li> <li>• MAF709/MAA727 Financial Planning Development</li> <li>• MP1753/MPF753 Finance</li> </ul>

Education Provider	Qualification
<p><b>Deakin University</b></p>	<p><b>Master of Financial Planning</b> <i>previously the Master of Wealth Management</i></p> <p><i>Advanced standing arrangement available for students 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• MAF765/MAA745 Financial Planning &amp; Analysis/Financial Planning Fundamentals</li> <li>• MAF707 Investments and Portfolio Management</li> <li>• MAA719/MAF708 Superannuation and Retirement Planning/Retirement Income Streams</li> <li>• MLC703 Principles of Income Tax Law</li> <li>• MLC707 Business Law / Commercial and Corporations Law</li> <li>• MAA727/MAF709 Financial Planning Development</li> <li>• MAA728/MAF714 Managing Client Relationships* / MAA728/MAI728 (intensive) Financial Behaviour and Decision Making</li> <li>• MAA700/MAI700 Estate Planning and Risk Management Strategies <i>*superseded</i></li> </ul>
<p><b>Financial Services Institute of Australia (FINSIA)</b></p>	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced on or before Semester 2, 2008. Advanced standing for this qualification may be provided ONLY IF the student also has a Master or Bachelor degree</i></p>
<p><b>Griffith University</b></p>	<p><b>Graduate Diploma of Financial Planning (4185/4186)</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• 7818AFE/7254AFE Financial Planning Fundamentals</li> <li>• 7803AFE/7223AFE Financial Markets</li> <li>• 7817AFE/7106AFE Income Tax Law</li> <li>• 7819AFE/7256AFE Personal Risk Management</li> <li>• 7820AFE/7255AFE Applied Financial Planning</li> <li>• 7801AFE/7232AFE Investments</li> <li>• 7822AFE/7161AFE Applied Taxation</li> <li>• 7821AFE/7214AFE Retirement and Estate Planning</li> <li>• 7250AFE/7814AFE Professionalism in Financial Services* / 7269AFE/7815AFE Ethics and Professionalism <i>*superseded</i></li> </ul> <p><b>Master of Business Administration (Financial Planning)</b></p> <p><i>Advanced standing arrangement available for students who commenced on or after Semester 2, 2012</i></p> <ul style="list-style-type: none"> <li>• 7202AFE Financial Planning</li> <li>• 7232AFE Wealth management</li> <li>• 7208AFE Financial Planning, Construction &amp; Review</li> <li>• 7214AFE Retirement and Estate Planning</li> </ul> <p><b>Master of Commerce (Financial Planning)</b></p> <p><i>Advanced standing arrangement available for students who commenced on or after Semester 1, 2014</i></p> <ul style="list-style-type: none"> <li>• 7303AFE Economics</li> <li>• 7202AFE Financial Planning</li> <li>• 7203AFE Corporate Financial Risk Management</li> <li>• 7151AFE Income Tax for Financial Planning</li> <li>• 7108AFE Taxation Planning</li> <li>• 7214AFE Retirement and Estate Planning</li> <li>• 7232AFE Investment Analysis</li> <li>• 7208AFE Financial Planning, Construction and Review</li> </ul>



Education Provider	Qualification
<p><b>Griffith University</b></p>	<p><b>Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• 7254AFE Financial Planning Fundamentals</li> <li>• 7256AFE Personal Risk Management</li> <li>• 7232AFE Investments</li> <li>• 7151AFE Taxation for Financial Planners OR 7106AFE Income Tax Law</li> <li>• 7159AFE Principles of Business &amp; Corporations Law</li> <li>• 7255AFE Applied Financial Planning OR 7259AFE Financial Planning skills + AMP/Ethics Centre Program (AMP only)</li> </ul> <p style="text-align: center;">OR</p> <p style="text-align: center;">7269AFE Ethics and Professionalism</p> <ul style="list-style-type: none"> <li>• 7246AFE Behavioural Finance &amp; Wealth Management</li> <li>• 7214AFE Retirement and Estate Planning</li> </ul>
<p><b>Kaplan Higher Education</b></p>	<p><b>Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• FPC001B Economic, Legal and Ethical Context for Financial Planning</li> <li>• FPC002B Ethics and Professionalism in Financial Advice</li> <li>• FPC003 Superannuation and Retirement Advice</li> <li>• FPC004 Insurance Advice</li> <li>• FPC005 Estate and Succession Planning</li> <li>• FPC006 Tax and Commercial Law for Financial Planning</li> <li>• FPC007B Client Engagement Skills</li> <li>• FPC008 Investment Advice</li> <li>• FPC009 Complex Financial Planning</li> </ul> <p>Note:</p> <ol style="list-style-type: none"> <li>1. FPE011 Debt Strategies and FPE16 SMSF are no longer required subjects after 30 March 2018.</li> <li>2. Students who completed FPC008 Investment Advice prior to 30 March 2018 (i.e. Study Period 2 2018- 2018SP2) must complete FPE011 Debt Strategies as a required elective to be in line with the FPEC curriculum.</li> </ol> <hr/> <p><b>Graduate Diploma of Financial Planning (GDFP19)</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• FPC001B Economic and Legal Context for Financial Planning</li> <li>• FPC002B Ethics and Professionalism in Financial Advice</li> <li>• FPC003 Superannuation and Retirement Advice</li> <li>• FPC004 Insurance Advice</li> <li>• FPC005 Estate and Succession Planning</li> <li>• FPC006 Tax and Commercial Law for Financial Planners</li> <li>• FPC007B Client Engagement Skills</li> <li>• FPC008 Investment Advice</li> </ul>

Education Provider	Qualification
<p><b>Kaplan Higher Education</b></p>	<p><i>Archived Programs</i></p> <p><b>Graduate Diploma of Applied Finance (Financial Planning)</b>  <b>Graduate Diploma of Financial Planning</b>  <b>Graduate Diploma of Financial Planning (GDFP14)</b></p> <p><i>Advanced standing for this qualification may be provided <b>ONLY IF the student also has a Master or Bachelor degree.</b></i></p> <ul style="list-style-type: none"> <li>• FIN211 Financial Planning Fundamentals</li> <li>• FIN212 Investment Products</li> <li>• FIN213 Superannuation and Retirement Planning</li> <li>• FIN214 Insurance, Succession and Estate Planning</li> </ul> <p>Commencement Dates:</p> <ul style="list-style-type: none"> <li>• Graduate Diploma of Financial Planning Accredited for students commencing during or after 2006 and before the end of 2013</li> <li>• Graduate Diploma of Applied Finance (Financial Planning Major) Accredited for students commencing during or after 2006 and before the end of 2010</li> <li>• Graduate Diploma in Financial Planning (GDFP14) Accredited for students commencing during or after 1 January 2014 and before the end of July 2019</li> </ul>

Education Provider	Qualification
<b>La Trobe University</b>	<p><b>Any Master degree program in the Financial Planning specialisation</b></p> <p><i>Advanced standing arrangement available for students who commenced from Semester 1, 2009 to Semester 2, 2014</i></p> <ul style="list-style-type: none"> <li>• ECO5POE Principles of Economics</li> <li>• FIN5POF Principles of finance</li> <li>• FIN5FPL Financial Planning</li> <li>• FIN5REP Retirement and Estate Planning</li> <li>• FIN5CFP Case Studies in Financial Planning</li> <li>• FIN5PMT Portfolio Management</li> <li>• FIN5DBS Debt Securities</li> <li>• FIN5EQS Equity Securities</li> <li>• FIN5DER Derivative Securities</li> </ul>
<b>Queensland University of Technology</b>	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2023</i></p> <ul style="list-style-type: none"> <li>• AYN456 Business and Corporations Law</li> <li>• AYN457 Financial Planning Principles and Regulation</li> <li>• EFN429 Investments Management</li> <li>• AYN458 Ethics and Professional Relationships</li> <li>• AYN438 Taxation Law and Practice</li> <li>• AYN442 Superannuation and Wealth Management</li> <li>• EFN516 Insurance and Risk Management</li> <li>• EFN520 Financial Planning Capstone</li> </ul>
<b>RMIT University</b>	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced from Semester 2, 2021 to Semester 2, 2024.</i></p> <ul style="list-style-type: none"> <li>• BAFI3244 Financial Planning Regulatory Obligations</li> <li>• BAFI3242 Professional Ethics</li> <li>• BAFI3245 Behavioural Financial Advice</li> <li>• LAW2480 Business and Corporations Law</li> <li>• BAFI3240 Superannuation and Retirement Income</li> <li>• LAW2471 Taxation Law and Practice</li> <li>• BAFI3243 Insurance and Estate Planning</li> <li>• BAFI3246 Applications in Financial Planning</li> </ul> <hr/> <p><b>Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced from Semester 2, 2021 to Semester 2, 2024.</i></p> <ul style="list-style-type: none"> <li>• BAFI3244 Financial Planning Regulatory Obligations</li> <li>• BAFI3242 Professional Ethics</li> <li>• BAFI3245 Behavioural Financial Advice</li> <li>• LAW2480 Business and Corporations Law</li> <li>• BAFI3240 Superannuation and Retirement Income</li> <li>• LAW2471 Taxation Law and Practice</li> <li>• BAFI3243 Insurance and Estate Planning</li> <li>• BAFI3246 Applications in Financial Planning</li> </ul>

Education Provider	Qualification
<p><b>Swinburne University</b></p>	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• ACC80012 Taxation Principles and Planning</li> <li>• FIN60007 / FIN60010 Elements of Financial Planning / Elements of Financial Planning and Regulation</li> <li>• LAW60003 Corporations and Contract Law</li> <li>• FIN60009 Ethics, Regulation and Client Management / FIN60012 Ethics and Client Management (available S2 2022)</li> <li>• FIN60008 / FIN60011 Investment and Behavioural Finance / Behavioural Finance and Investment</li> <li>• FIN80022 Insurance and Estate Planning</li> <li>• FIN80023 Superannuation and Retirement Planning</li> <li>• FIN80025 Financial Advice Technology Project</li> </ul>
	<p><b>Master of Financial Planning</b></p> <p><b>Master of Professional Accounting / Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• FIN60007 / FIN60010 Elements of Financial Planning / Elements of Financial Planning and Regulation</li> <li>• LAW60003 Corporations and Contract Law</li> <li>• AC60008 Accounting Systems and Reporting</li> <li>• FIN60008 Investment Decision Making</li> <li>• FIN60009 Ethics, Regulation and Client Management / FIN60012 Ethics and Client Management (available S2 2022)</li> <li>• FIN80022 Insurance and Estate Planning</li> <li>• FIN80023 Superannuation and Retirement Planning</li> <li>• ACC80012 Taxation Principles and Planning</li> <li>• ACC80008 Managerial Accounting</li> <li>• FIN80005 Corporate Financial Management</li> <li>• ECO80001 Economics</li> <li>• FIN80025 Financial Advice Technology Project</li> </ul>
<p><b>TAFE NSW Higher Education</b></p>	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• FPINS501A Insurance and Superannuation Planning</li> <li>• FPRET501A Retirement and Estate Planning</li> <li>• FPINV501A Investment Planning</li> <li>• FPTAX501A Taxation Planning</li> <li>• FPETH501A Ethics and Professional Standards for Financial Advisers</li> <li>• FPBFI501A Behavioural Finance</li> <li>• FPLAW501A Commercial and Corporations Law</li> <li>• FPAFA501A Applied Financial Advice</li> </ul>
<p><b>University of Adelaide</b></p>	<p><b>ANY Master degree with Financial Planning specialisation.</b></p> <p><i>Advanced standing arrangement available for students who commenced on or before Semester 2, 2012</i></p> <ul style="list-style-type: none"> <li>• CORPFIN 6003 Tax, Estate and Wealth Planning</li> <li>• CORPFIN 6005 Investment Process and Client Relationship Management</li> <li>• CORPFIN 6000 Industry Research Project</li> <li>• CORPFIN 6004 Global Wealth Management</li> </ul>

Education Provider	Qualification
<p style="text-align: center;"><b>University of New England</b></p>	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2023</i></p> <ul style="list-style-type: none"> <li>• FPL413 Investment Fundamentals and Financial Advice Principles</li> <li>• LSSU595 Taxation Law for Financial Services</li> <li>• MM467 Professional Ethics</li> <li>• FPL580 Financial Advice Construction and Client Communication Simulation</li> <li>• FPL550 Behavioural Finance and Investment Portfolio Management</li> <li>• FPL501 Superannuation and Retirement Planning Strategies and Advice</li> <li>• FPL512 Insurance Planning, Risk Management and Estate Planning</li> <li>• LSSU594 Issues in Commercial and Financial Services Law</li> </ul>
	<p><b>Master of Financial Services</b></p> <p><i>Advanced standing arrangement available for students who commenced on or before Trimester 3, 2016. Currently in teach-out mode.</i></p> <ul style="list-style-type: none"> <li>• AFM465/AFM565/AFM522 Financial Planning and Wealth Management/Financial Planning</li> <li>• AFM466 Risk Management and Insurance</li> <li>• AFM467/AFM567 Superannuation and Retirement</li> <li>• AFM468 Investment Management in Financial Planning</li> <li>• AFM569 Developing the Financial Plan</li> <li>• LSSU592 Taxation Law</li> <li>• Either <ul style="list-style-type: none"> <li>○ LSSU450 Commercial Law 1: Principles of Australian Law</li> <li>○ LSSU591 Law of Commercial Associations</li> </ul> </li> <li>• AFM442 Financial Instruments and Markets</li> <li>• AFM532 Security Analysis and Portfolio Management</li> </ul> <p><i>Note: Please refer to this <a href="#">link</a> to view previous versions of the Master of Financial Services and requisite units.</i></p>

Education Provider	Qualification
<p style="text-align: center;"><b>University of NSW</b></p>	<p><b>Master of Financial Planning (9273)</b></p> <p><i>Advanced standing arrangement available for students who commenced on or after 1 July 2019</i></p> <ul style="list-style-type: none"> <li>• FINS5510 Personal Financial Planning and Management</li> <li>• FINS5512 Financial Markets and Institutions</li> <li>• FINS5513 Investments and Portfolio Selection</li> <li>• FINS5531 Risk and Insurance</li> <li>• FINS5537 Financial Planning Advice and Ethics</li> <li>• FINS5539 Estate Planning, Succession and Asset Planning</li> <li>• TABL5511 Legal Foundations of Business / TABL5512 Legal Foundations for Accounting</li> <li>• TABL5901 Principles of Australian Tax Law / TABL5527 Tax Strategies in Financial Planning</li> </ul>
	<p><b>Graduate Diploma of Financial Planning (5273)</b></p> <p><i>Advanced standing arrangement available for students who commenced on or after 1 July 2019</i></p> <ul style="list-style-type: none"> <li>• FINS5510 Personal Financial Planning and Management</li> <li>• FINS5512 Financial Markets and Institutions</li> <li>• FINS5513 Investments and Portfolio Selection</li> <li>• FINS5531 Risk and Insurance</li> <li>• FINS5537 Financial Planning Advice and Ethics</li> <li>• FINS5539 Estate Planning, Succession and Asset Planning</li> <li>• TABL5511 Legal Foundations of Business / TABL5512 Legal Foundations for Accounting</li> <li>• TABL5901 Principles of Australian Tax Law / TABL5527 Tax Strategies in Financial Planning</li> </ul>
	<p><b>Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced at any time after 01 October 2011 and before Semester 2, 2021</i></p> <ul style="list-style-type: none"> <li>• FINS5510 Personal Financial Planning and Management</li> <li>• FINS5531 Risk and Insurance</li> <li>• FINS5513 Investments and Portfolio Selection</li> <li>• ACTL5401 Retirement Planning</li> <li>• Either <ul style="list-style-type: none"> <li>○ TABL5901 Principles of Australian Tax Law OR</li> <li>○ TABL5527 Tax Strategies in Financial Planning</li> </ul> </li> <li>• TABL511 Legal Foundations of Business</li> <li>• FINS5539 Estate Planning, Succession and Asset Protection</li> <li>• FINS512 Financial Markets and Institutions</li> </ul>

<p><b>University of South Australia</b></p>	<p><b>DGFP Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2023</i></p> <ul style="list-style-type: none"> <li>• ACCT5017 Taxation</li> <li>• BANK5013 Investment Management</li> <li>• BANK5040 Applied Financial Planning G</li> <li>• BANK5041 Estate Planning G</li> <li>• BANK5044 Risk Management and Insurance G</li> <li>• BANK5045 Superannuation G</li> <li>• BUSS5446 Ethics and Professionalism</li> <li>• COML5017 Financial Advice Regulatory and Legal Obligations</li> </ul>
	<p><b>XGFP Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2023</i></p> <ul style="list-style-type: none"> <li>• ACCT5017 UO Taxation</li> <li>• BANK5013 UO Investment Management</li> <li>• BANK5040 UO Applied Financial Planning G</li> <li>• BANK5041 UO Estate Planning G</li> <li>• BANK5044 UO Risk Management and Insurance G</li> <li>• BANK5045 UO Superannuation G</li> <li>• BUSS5447 UO Ethics and Professionalism</li> <li>• COML5018 Financial Advice Regulatory and Legal Obligations</li> </ul>
	<p><b>Master of Finance (Financial Planning) / Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2023</i></p> <ul style="list-style-type: none"> <li>• COML5009 Commercial Law</li> <li>• BANK5013 Investment Management</li> <li>• BANK5042 Introduction to Financial Planning G</li> <li>• BANK5045 Superannuation G</li> <li>• BANK5044 Risk Management &amp; Insurance G</li> <li>• BANK5041 Estate Planning G</li> <li>• BANK5040 Applied Financial Planning G</li> <li>• ACCT5017 Taxation</li> <li>• MATH4044 Statistics for Data Science</li> <li>• ACCT5011 Accounting for Management M</li> <li>• ECON5020 Economics Principles for Business</li> <li>• BANK5014 Financial Theory and Financial Markets</li> <li>• BUSS5233 Corporate Finance</li> <li>• MARK5025 Marketing Management</li> <li>• BUSS5385 Ethics, Governance and Sustainability</li> <li>• BANK5043 Personal Finance G</li> </ul>

Education Provider	Qualification
<p style="text-align: center;"><b>University of Southern Queensland</b></p>	<p><b>Master of Business (Personal Financial Planning specialisation)</b></p> <p><i>Advanced standing arrangement available for students who commenced on or before Semester 2, 2012</i></p> <ul style="list-style-type: none"> <li>• FIN5412 Financial Planning</li> <li>• FIN5414 Management Investments</li> <li>• FIN5415 Superannuation and Retirement Planning</li> <li>• FIN5416 Insurance Markets and Products</li> <li>• FIN8102 Global Financial Markets</li> <li>• FIN8103 Investment Management Strategies</li> <li>• FIN8107 Financial Risk Management</li> <li>• LAW5201/LAW5206 commercial Law</li> <li>• LAW5230 Taxation Law</li> <li>• ACC5502 Accounting for Managers</li> </ul>
	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced on or before Semester 2, 2012. Advanced standing is available ONLY IF completed with a Bachelor or Master degree.</i></p>
<p style="text-align: center;"><b>University of the Sunshine Coast</b></p>	<p><b>Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced on or before Semester 2, 2011</i></p> <ul style="list-style-type: none"> <li>• FIN710 Superannuation and Retirement Planning</li> <li>• BUS704 Corporate Finance</li> <li>• FIN712 Taxation Planning and Estate Planning</li> <li>• FIN711 Financial Plan Development, Consulting and Negotiation</li> <li>• FIN720 Financial and Investment Planning</li> <li>• FIN721 Risk Management and Insurance Planning</li> </ul>
	<p><b>Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students who commenced on or before Semester 2, 2011. Advanced standing is available ONLY IF completed with a Bachelor or Master degree.</i></p>



Education Provider	Qualification
<p style="text-align: center;"><b>Western Sydney University</b></p>	<p><b>Graduate Diploma in Financial Planning / Graduate Diploma of Financial Planning</b></p> <p><i>Advanced standing arrangement available for by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• 200987 Financial Adviser Communication Skills / FINC 7001 of FINC 7002 Communication and Ethics for Financial Planners</li> <li>• 200432 / LAWS 7009 Commercial Law</li> <li>• 200866 Principles of Financial Planning</li> <li>• 200868 Investment Planning</li> <li>• 200867/ FINC 7020 Superannuation</li> <li>• 200870 / FINC 7010 Insurance and Risk Management (Capstone for Graduate Diploma exit)</li> <li>• 20081 Planning for Retirement</li> </ul>
	<p><b>Graduate Diploma in Stockbroking and Financial Planning / Graduate Diploma of Stockbroking and Financial Advising</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• 200986 Financial Products and Markets / FINC 7008 Financial Products and Markets</li> <li>• 200987 Financial Adviser Communication Skills / FINC 7001 of FINC 7002 Communication and Ethics for Financial Planners</li> <li>• 200869 / LAWS 7031 Principles of Taxation</li> <li>• 200432 / LAWS 7009 Commercial Law</li> <li>• 200867/ FINC 7020 Superannuation</li> <li>• 201048 Behavioural Finance for Advisers</li> <li>• 200870 / FINC 7010 Insurance and Risk Management (Capstone for Graduate Diploma exit)</li> <li>• 201002 / FINC 7003 Estate Planning</li> </ul>
	<p><b>Master of Commerce (Financial Planning) / Master of Financial Planning</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025</i></p> <ul style="list-style-type: none"> <li>• 200987 Financial Adviser Communication Skills / FINC 7001 of FINC 7002 Communication and Ethics for Financial Planners</li> <li>• 200866 Principles of Financial Planning</li> <li>• 200870 / FINC 7010 Insurance and Risk Management (Capstone for Graduate Diploma exit)</li> <li>• 200868 Investment Planning</li> <li>• 200867/ FINC 7020 Superannuation</li> <li>• 200869 / LAWS 7031 Principles of Taxation</li> <li>• 200432 / LAWS 7009 Commercial law</li> <li>• 200871 Planning for Retirement</li> <li>• Research Project or Internship</li> </ul>

<p><b>Western Sydney University</b></p>	<p><b>Master of Stockbroking and Financial Advising</b></p> <p><i>Advanced standing arrangement available for students by 28 February 2025 /</i></p> <ul style="list-style-type: none"> <li>• 200986 Financial Products and Markets / FINC 7008 Financial Products and Markets</li> <li>• 200987 Financial Adviser Communication Skills / FINC 7001 of FINC 7002 Communication and Ethics for Financial Planners</li> <li>• 200426 / ACCT 7012 Corporate Finance</li> <li>• 200432 / LAWS 7009 Commercial Law</li> <li>• 200867/ FINC 7020 Superannuation</li> <li>• 200869/ LAWS 7031 Principles of Taxation</li> <li>• 200870 / FINC 7010 Insurance and Risk Management (Capstone for Grad Diploma exit)</li> <li>• 201002 / FINC 7003 Estate Planning</li> <li>• 51212 / BUSM 7083 Security Analysis and Portfolio Theory</li> <li>• 200872 / LAWS 7011 Contemporary Issues in Taxation -OR- 51169/ BUSM 7022Derivatives</li> <li>• 200960/ FINC 7019 Statement of Advice Research Project</li> <li>• 51168 / BUSM 7035 Funds Management and Portfolio Selection</li> </ul>
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## Additional Information

### FPEC Determination on student's commencement period of an accredited degree

The Financial Planning Education Council (FPEC) determines that a student who started the degree while the degree is accredited will have an accredited degree even if they finish when the degree is no longer accredited.

An exception to this rule occurs when the approved program is in 'teach-out' mode and students complete the remaining units via other non-FPEC approved providers. This will not constitute an approved degree. In this case, the student should contact the Financial Adviser Standards and Ethics Authority (FASEA) to have their transcripts reviewed.

## University Contact

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<b>Curtin University</b>	<b>Prof. Robert Durand</b>  Faculty of Business and Law   School of Economics and Finance	<a href="mailto:Robert.Durand@curtin.edu.au">Robert.Durand@curtin.edu.au</a> (08) 9266 9971  Curtin University GPO Box U1987, Perth WA 6845
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University Name	Contact Personnel	Contact Details
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## CFP® CERTIFICATION PROGRAM

Approved Degree List for Advanced Standing

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University Name	Contact Personnel	Contact Details
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<b>University of Southern Queensland</b>	<b>Dr. Lujer Santacruz</b> Lecturer (Finance) School of Commerce   Faculty of Business Education, Law and Arts	<a href="mailto:santacru@usq.edu.au">santacru@usq.edu.au</a> (07) 4631 1574   0439 855 649  University of Southern Queensland Faculty of Business, Education, Law and Arts West St., Toowomba, Queensland 4350
<b>University of Wollongong</b>	<b>Ms. Loretta Iskra</b> Lecturer School of Accounting, Economics and Finance	<a href="mailto:loretta_iskra@uow.edu.au">loretta_iskra@uow.edu.au</a> (02) 9514 7765  School of Accounting, Economics and Finance Faculty of Business University of Wollongong Northfields Avenue, Wollongong, NSW 2522



## CFP® CERTIFICATION PROGRAM

Approved Degree List for Advanced Standing

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<b>Western Sydney University</b>	<b>Dr. Michelle Cull</b> Director – Academic Program (Accounting) School of Business	<a href="mailto:M.Cull@westernsydney.edu.au">M.Cull@westernsydney.edu.au</a> (02) 4620 3519  School of Business Western Sydney University Locked Bag 1797 Penrith NSW 2751