



CFP® CERTIFICATION PROGRAM

Application to Enrol

Semester 2 2022

Please email your completed form to education@fpa.com.au

1. APPLICATION DETAILS

FPA Member ID:

2. PERSONAL DETAILS

Title:

First name:

Middle name:

Surname:

DOB:

Email:

Contact number:

Mailing address:

Number & Street:

Suburb:

State:

Postcode:

3. WORK DETAILS

Company:

Job title:

ASIC Financial Adviser Register Number:

Licensee:

FPA Professional Practice 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

This unit is currently not available. We recommend completing a FASEA approved ethics bridging unit and apply for CFP 1 advanced standing. Send your transcript to education@fpa.com.au

CFP 1	New - No advanced standing	\$1600	<input type="checkbox"/>	
	New - advanced standing (from CFP 2 - CFP 4)	\$1600	<input type="checkbox"/>	
	Repeat	\$1100	<input type="checkbox"/>	

CFP 2	New	\$1600	<input type="checkbox"/>	
	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"/>	
	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"/>	
	Repeat	\$1100	<input type="checkbox"/>	

CFP Certification	Please select: 1 semester <input type="checkbox"/> 1 year <input type="checkbox"/>			1 Semester All assessments are due within the semester 1 Year Assignment and Experience are due within the first enrolled semester, followed by the exam in the second enrolled semester
	New	\$1980	<input type="checkbox"/>	
	Repeat all	\$1300	<input type="checkbox"/>	
	Repeat assignment	\$1100	<input type="checkbox"/>	
	Repeat exam	\$1100	<input type="checkbox"/>	



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 a FASEA approved degree

7. EDUCATION PATHWAY

(Please tick your pathway into the CFP Certification Program, complete the table below and **supply official academic transcripts** if not submitted already) Screen shots of units are not acceptable.

- A FASEA approved degree (FASEA's approved degree list available at www.legislation.gov.au)
- An Australian financial degree with a Diploma of Financial Planning (meeting RG146)
- A non-related international degree with an Advanced Diploma of Financial Planning (meeting RG146)
- An Advanced Diploma of Financial Planning and working towards your degree
- Have completed eight (8) subjects from a FASEA approved Master degree (Graduate Diploma) *Education pathway valid until 2024
- Enrolled in an Integrated Masters + CFP Program with a partner institution

Title of Degree	Awarding Institution	Date of completion



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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 applies to CFP 1, 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 for Advanced Standing available at www.fpa.com.au)
- CPA – Financial Planning Specialist (accountants must have the specialist designation in financial planning certificate)
- CA – Financial Planning Specialist (accountants must have the specialist designation in financial planning certificate)
- CIMA - Certified Investment Management Analyst
- CFA – Certified Financial Analyst certification and hold the designation

- Approved FASEA Ethics Bridging Course and have completed the FPA's [Know-Your-Code Online Module](#).

9. FOR CFP CERTIFICATION STUDENTS ONLY

FOR CFP C and CFP MEMBERSHIP (please see the [Experience requirements document](#) for more information)

- Four (4) years full-time, relevant experience that demonstrates financial planning knowledge and competencies, and directly or indirectly supports the financial planning process.
- Two (2) years full-time (or part-time equivalent) client-facing Authorised Representative experience within the last five years (does not include the professional year).

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 agree for the FPA to promote my CFP only once I have fully completed all requirements of the program.
- 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.
- I acknowledge that I have read, understood and consent to abide by the [FPA Code of Ethics](#) for the full duration of my CFP Certification Studies.

Your signature:

Date:



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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 Practice**, you receive a **10% preferential discount on new enrolments only**. **This is not available for repeat students**. Please list your 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 name (if applicable):	
Total fee which I hereby authorise the FPA to debit from my credit card	Total fee \$
You will be contacted by an FPA Education team member to arrange payment.	

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 (for new students)

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.

<input type="checkbox"/>	Provided FPA Member ID on form
<input type="checkbox"/>	Attached copies of official Academic Transcript(s), if required
<input type="checkbox"/>	Evidence of experience, if required
<input type="checkbox"/>	Completed payment section
<input type="checkbox"/>	Signed Student Declaration