



Guidance for IFA Case Study candidates

The process for members working towards CFP^{CM} professional status takes some time, as it involves joining as a Provisional member and progressing to General member over two or more years.

General members who have completed an approved Diploma in Personal Financial Planning and who are in good standing with IFA can then apply to complete the final step for CFP^{CM} professional status.

This final requirement is completion of an acceptable comprehensive financial plan, based on a case study set by IFA. Each case study is approved for issue by the Certification Committee which meets at two monthly intervals during the year. The time for completion of the plan is 24 days, and guidance notes on IFA requirements are provided.

The Committee expects the resulting financial plans to be of a professional standard, reflecting the international standing and recognition of the CFP^{CM} professional mark.

When submitted plans do not achieve the required standard, the Certification Committee provides comment on matters needing improvement and recommends that the candidate discuss their plan and the Committee comments with their mentor or a trusted colleague to ensure maximum benefit is obtained from the process, which is not meant to be an educational one in the first instance, but rather a gatekeeper check of quality.

We wish to support members facing this final step on what is usually a long and dedicated journey to attain the CFP^{CM} professional designation etc. etc.

For more information please contact:

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