

Being authorized to use the CFP^{CM} mark means your financial planner has met the following professional requirements:

Experience

CFP^{CM} practitioners have had, as a minimum, three years experience in the financial planning process.

Education

CFP^{CM} practitioners have built their theoretical and practical financial planning knowledge by completing a comprehensive course of study and passing the required examinations.

Professional Development

CFP^{CM} professionals keep their knowledge up to date by taking part in at least 40 hours of relevant continuing education every two years.

Choosing a Certified Financial Planner^{CM} practitioner to help you achieve your financial goals in life is a smart choice. If we can help you with any more information, then please get in touch.

Contact us

on the web: www.ifa.org.nz

email: info@ifa.org.nz

by phone: 0800 404 422

by fax: 04 499 8064

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Professionally Qualified

Your adviser is a Certified Financial Planner^{CM} practitioner.



INSTITUTE OF
FINANCIAL
ADVISERS

Working with a financial planner

Congratulations! You are reading this because you understand that the life you enjoy tomorrow will depend on the financial decisions you make today. Perhaps you think that's obvious, but many other people seem to expect the future to take care of itself. You have understood the power of financial planning.

Your next step has been to find someone who can help you achieve what you want and that's the role of your financial planner. It's like having a personal money coach. Your financial planner will provide you with expert guidance over your lifetime, helping maintain your financial well-being and progress towards your life goals.

Their starting point is to understand your current position and where you would like to be in the future. Then, your financial planner will develop, and help you implement, a plan to get you there – a plan that's right for you.

Financial planners are different from other financial advisers you may have worked with because they take this holistic approach. Of course, for some parts of your plan they may refer you to a specialist (for example, a tax accountant), but your financial planner will play the central role in helping you make the right financial decisions for your future.



The value of a qualified professional.

The impact of the financial decisions you make today may not be obvious for some time, but they will lay the foundation for the rest of your life. Which makes it so important that you seek the advice of someone you can trust and someone who is competent.

The financial planner you are talking to is a member of the Institute of Financial Advisers. That means they have embraced our code of ethics and our structured process for preparing and presenting advice. You can have confidence that you are dealing with a professional, someone committed to helping you achieve the outcome that is right for you.

Importantly, you are talking to a Certified Financial Planner^{CM} practitioner. The CFP^{CM} mark is a world standard for financial planning professionals and it means you can be confident that your adviser has the experience, education, and knowledge to ensure you receive professional, competent advice.

Seven things our members believe in:

Integrity Being truthful and trustworthy.

Objectivity Acting in your best interests.

Competence Maintaining the necessary skills, knowledge and business expertise.

Fairness Respecting others.

Confidentiality Protecting your private information.

Professionalism Maintaining an ethical reputation.

Diligence Delivering. Promptly and thoroughly.

