

Migration Pathways for Candidates currently in the  
**ADVOCIS CFP® CERTIFICATION PROGRAM**

If you have completed:

You have earned the following equivalencies in the Advocis CFP Certification Program (QAFF & CFP)

These are the new Body of Knowledge modules you are required to complete in the Advocis CFP Certification Program (QAFF & CFP)

**FP 241** – Financial Planning Foundations Course which consists of the following modules:

- Module 1:** The Financial Services Industry & Planning Fundamentals
- Module 2:** Financial Statements & Budgeting
- Module 3:** Government Benefits & Programs
- Module 4:** Time Value of Money
- Module 5:** Economics & Investment Fundamentals Program

- Module 01:** Financial Planning Profession & Financial Services Industry Regulation
- Module 02:** Financial Analysis
- Module 06:** Registered Education & Disability Plans
- Module 07:** Economics

*Candidates continuing their CFP studies will receive complementary access to the above new Body of Knowledge modules in order to prepare for the QAFF or CFP exam*

- Module 03:** Credit & Debt
- Module 04:** Registered Retirement Plans
- Module 05:** Government Benefit Plans
- Module 08:** Investments
- Module 09:** Taxation
- Module 10:** Law
- Module 11:** Insurance
- Module 12:** Human Behaviour

For **QAFF candidates**, Advocis strongly recommends candidates complete the (optional) Advocis Comprehensive QAFF Exam Preparation course. For **CFP candidates**, it is a requirement to complete the Advanced Topics course. It is also a requirement to complete the Advocis Comprehensive CFP Exam, which is the assessment for the Advanced Topics program.

**FP 241** – Financial Planning Foundations and  
**FP 242** – Taxation & Investment Planning which consists of the following modules:

- Module 6:** Personal Income Tax Reporting
- Module 7:** Tax Applications
- Module 8:** Business & Organizational Structures
- Module 9:** Investment Products
- Module 10:** Investment Planning & Analysis

- Module 01:** Financial Planning Profession & Financial Services Industry Regulation
- Module 02:** Financial Analysis
- Module 06:** Registered Education & Disability Plans
- Module 07:** Economics
- Module 08:** Investments
- Module 09:** Taxation

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- Module 03:** Credit & Debt
- Module 04:** Registered Retirement Plans
- Module 05:** Government Benefit Plans
- Module 10:** Law
- Module 11:** Insurance
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**FP 241** – Financial Planning Foundations,  
**FP 242** – Taxation & Investment Planning and  
**FP 243** – Retirement Income Planning which consists of the following modules:

- Module 11:** Government Retirement Benefit Plans
- Module 12:** Registered Pension Plans
- Module 13:** Registered Retirement Savings Plans
- Module 14:** Retirement Income
- Module 15:** Retirement Planning

- Module 01:** Financial Planning Profession & Financial Services Industry Regulation
- Module 02:** Financial Analysis
- Module 04:** Registered Retirement Plans
- Module 05:** Government Benefit Plans
- Module 06:** Registered Education & Disability Plans
- Module 07:** Economics
- Module 08:** Investments
- Module 09:** Taxation

*Candidates continuing their CFP studies will receive complementary access to the above modules in order to prepare for the QAFP or CFP exam*

- Module 03:** Credit & Debt
- Module 10:** Law
- Module 11:** Insurance
- Module 12:** Human Behaviour

For **QAFP candidates**, Advocis strongly recommends candidates complete the Comprehensive QAFP Exam Preparation course.

For **CFP candidates**, it is a requirement to complete the Advanced Topics course. It is also a requirement to complete the Advocis Comprehensive CFP Exam, which is the assessment for the Advanced Topics program.

**FP 241** – Financial Planning Foundations,  
**FP 242** – Taxation & Investment Planning,  
**FP 243** – Retirement Income Planning and  
**FP 244** – Insurance & Estate Planning which consists of the following modules:

- Module 16:** Legal Fundamentals & Family Law
- Module 17:** Risk Management & Insurance Fundamentals
- Module 18:** Life Insurance & Living Benefits
- Module 19:** Estate Planning

- Module 01:** Financial Planning Profession & Financial Services Industry Regulation
- Module 02:** Financial Analysis
- Module 04:** Registered Retirement Plans
- Module 05:** Government Benefit Plans
- Module 06:** Registered Education & Disability Plans
- Module 07:** Economics
- Module 08:** Investments
- Module 09:** Taxation
- Module 10:** Law
- Module 11:** Insurance

*Candidates continuing their CFP studies will receive complementary access to the above modules in order to prepare for the QAFP or CFP exam*

- Module 03:** Credit & Debt
- Module 12:** Human Behaviour

For **QAFP candidates**, Advocis strongly recommends candidates complete the Comprehensive QAFP Exam Preparation course.

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**PFA Advanced Launch Designation Program:**

Candidates, who have successfully completed this program, have earned advanced standing in the Advocis CFP Certification program. In order to continue towards QAFP and / or CFP certification, candidates must complete the coursework for FP 241, FP 242, and FP 243.

Candidates will have complementary access to and will have until the end of December 31, 2020, to complete the following:

**FP 241**

- Mandatory case study
- Course exam

**FP 242**

- Mandatory case study
- Course exam

**FP 243**

- Module quizzes for modules 14 and 15
- Mandatory case study
- Course exam

- Module 01:** Financial Planning Profession & Financial Services Industry Regulation
- Module 02:** Financial Analysis
- Module 04:** Registered Retirement Plans
- Module 05:** Government Benefit Plans
- Module 06:** Registered Education & Disability Plans
- Module 07:** Economics
- Module 08:** Investments
- Module 09:** Taxation

*Candidates continuing their CFP studies will receive complementary access to the above Body of Knowledge modules in order to prepare for the QAFP or CFP exam*

- Module 03:** Credit & Debt
- Module 10:** Law
- Module 11:** Insurance
- Module 12:** Human Behaviour

For **QAFP candidates**, Advocis strongly recommends candidates complete the Comprehensive QAFP Exam Preparation course.

For **CFP candidates**, it is a requirement to complete the Advanced Topics course. It is also a requirement to complete the Advocis Comprehensive CFP Exam, which is the assessment for the Advanced Topics program.