CUSTOMIZED LEARNING

PERSONAL FINANCIAL SERVICES ADVICE™ (PFSA)™

Everybody is different and so are their financial needs and situations areas. The Personal Financial Services Advice course helps you translate the unique requirements, challenges, and opportunities of every client into credible plans that advance their financial position.

YOU WILL DEVELOP

- Tools to better profile clients' needs, goals, and objectives.
- Strategies to assess the merits and risks of financial tools in relation to each client.
- Improved soft skills such as client communication, relationship management.
- A better understanding of financial processes, and the ins-and-outs of financial law.
- Ways to build a loyal customer base through superior service.

LEADS TO CAREERS SUCH AS:

- Investment Advisor
- Financial Planner
- Portfolio Manager
- Account Manager

PERSONAL FINANCIAL SERVICES ADVICE™ (PFSA)™

The Personal Financial Services Advice (PFSA)™ course is designed to help you confidently deliver the right advice to your clients based on their individual needs. You'll improve your communications skills, build stronger, more profitable relationships and ultimately, grow your client-base. What's more, completing the PFSA™ puts you one step closer to earning the Personal Financial Planner (PFP®) designation and Certificate in Financial Services Advice – APII®'s industry-leading credentials.

WHO SHOULD ENROLL

The PFSA™ is designed for individuals who may have little or no background in financial planning. These individuals have likely completed the Introduction to Securities Trade™ (IST)™ or the Global Investment Funds™ (GIF)™ course and are looking to advance their career in financial planning.

ABOUT THE EXAM

The PFSA exam is completely online and accessible through your online course. Advance booking is not required.

COURSE LEADS TO THE FOLLOWING CREDENTIALS:

PFP® Certificate program (PFP)®

CERTIFICATE IN PERSONAL SERVICES ADVICE

CERTIFICATE IN PERSONAL BANKING

Gain valuable insight into the key financial planning processes and principles that guide today's financial services organizations. Learn expert techniques and skills for building client trust, such as:

- Identify strategies for satisfying clients with varying needs, goals and objectives
- Evaluate the merits of different financial tools to create value for clients
- Assess the current financial climate in relation to client risk tolerance
- Build positive and profitable client relationships through communication, trust and credibility
- Establish a loyal client base through adherence to superior performance and service standards
- Identify and understand processes, procedures and legal requirements by which financial institutions are bound

How you'll learn

The PFSA course is delivered through an online interactive learning environment. You can take advantage of eBook readings, learning activities for self assessment, and a customized diagnostic tool designed to help you prepare for your exam.

Measure your progress

APII®'s online learning system helps you meet, and even exceed, your study goals. You'll benefit from:

- Learning objectives and goals that keep you focused
- Interactive tools to help you evaluate and apply course material
- Post-chapter tests to assess your progress
- Course updates
- A customizable calendar
- Online discussion forums and assistance from APII®'s academic support specialists

Approximate Hours of Study	
Hours of Study	50 - 70 hours

In order to provide some guidance to course participants as to the length of time it will take to be sufficiently prepared to write the final examination, APII® has prepared this estimate of the number of hours an average participant could possibly expect to spend studying for a course. Please note that **these are only recommended hours of study** developed based on research and our course content, however, this does not mean that some students with exceptional backgrounds would not take less time than recommended or that students with no background at all in finance or economics would not take longer than the maximum.

EXAM WEIGHTINGS (weightings are approximate)	
Building Relationships	15%
Communication and Collaboration	7%
Micro & Macroeconomics	10%
Personal Financial Statements	14%
Financial Math; Time Value of Money	13%
Needs Based Sales Approach	8%
Recommending Solutions	8%
Ethics in Bank Advisory Services	5%
Know Your Client and Risk Management	15%
Regulatory Organizations and Banking	5%

Important: The PFSA™ exam is completely online and accessible through your online course. Advance booking is not required.

EXAM INFORMATION	
Exams	1
Exam Format	Online
Exam Duration	90 minutes
Question Format	Multiple Choice
Questions Per Exam	60
Attempts Allowed Per Exam	2
Passing Grade	70%
Assignments	Yes
ENROLLMENT PERIOD	
Enrollment Period	6 MOIS

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