

Frequently Asked Questions



What is a Certified Financial Planner?

Certified Financial Planner[®] is the highest level of financial planning qualification available. A CFP[®] is a qualified and licensed professional who looks at the 'big picture' for your total financial situation and provides you with recommendations and guidance on how best to achieve the financial future you aspire to. A financial planner is in a position of trust and must conduct themselves accordingly.

The law currently lets a wide range of individuals call themselves a 'financial planner' and provide financial advice in some shape or form to the public. These individuals can include mortgage brokers, real estate agents, insurance brokers and many more.

However a CFP[®] professional has completed extensive training and experience requirements and are held to rigorous ethical standards. A CFP[®] understands all the complexities of the changing financial climate and will make recommendations in your best interest. You can identify a CFP[®] professional if they have the letters CFP[®] after their name.
