

CFP Certification Policies

Identity Protection and Non-discrimination

1. Confidentiality Policy

The results of all candidates who remain unsuccessful shall be kept confidential in the custody of FPSB India. The results would be uploaded on a fortnightly basis in the individual account of the candidate on Online Certification Management System (OCMS) accessible through the website of FPSB India. The data can be accessed by individual candidates through a login provided to candidates and is password-protected, the passwords are set by individual candidates.

The intimation to successful candidates in Exam 5: Advanced Financial Planning would be sent by mail requisitioning the candidate to fulfill the criteria of experience and adherence to Financial Planner Code of Ethics and Professional Responsibility. The documents submitted by the candidates for applying for CFP^{CM} Certification shall not be disclosed to anyone to preserve the confidentiality of candidate's specific information. These documents are required for cross-checking the relevant information provided by the candidate based on which the CFP^{CM} Certification shall be issued.

After certification procedure is complete, FPSB India publishes the profiles of CFP^{CM} Certificants on the website under the Certificants Directory Section in order to assist Financial Consumers to approach and select a CFP^{CM} professional to avail Financial Planning services. For the same, CFP^{CM} Certification form has a declaration from the candidate granting his consent for making his profile public on website.

2. Non-discrimination Policy

a) Professional Status while Registration/ Enrollment

A candidate can submit the registration form for the CFP^{CM} certification Program online if certain minimum eligibility criteria are met, e.g. age, education qualification (undergraduate or 10+2). The candidates are not denied registration on the basis of their being without any experience with the ones with sizable experience.

b) Professional Status while Registration/ Enrollment

The pathway, viz. Challenge Status Pathway (CSP), is open to individuals with higher qualifications as specified along with a prior relevant experience to appear in the CFP^{CM} Certification Examination directly without going through the Education criterion by passing all the module exams. There is no discrimination of any kind among the eligible candidates

on the basis of pathway or mode of examination chosen, i.e. the Certification Examination for both CSP and Regular Pathway candidates are delivered and evaluated on the same pre-specified standards.

c) Racial, Sectoral, Liguistic

FPSB India never discriminates amongst candidates, whether at the time of registration/enrollment, certification or recertification on the basis of sector, region, caste, religion, age, gender, or on the basis of linguistic skills. The language used in the examination is English for all candidates.

d) Members

The candidates or those eligible for certification/recertification are not distinguished on the basis of their allegiance to the institutional entities which are Charter Members or Promoters of FPSB India.

e) Open Architecture

FPSB India stands for an open architecture for education, i.e. no discrimination is made amongst candidates coming to the examination from various streams such as self study, distance learning, classroom learning, online, etc. Similarly, the two education providers or two education programs are not given any weight with respect to testing the candidates for CFP^{CM} certification, as well as at the juncture of awarding CFP^{CM} designation.