

List of Activities and Programs admissible for award of Continuous Education Points (CEPs) for renewal of CFP^{CM} Certification – Validity Review Period till 30th September, 2018.

Sr. No.	CE Category	CE Program/ Activity	CE Points (CEPs) Admissible	Validity of Program/ Activity	Remarks	Relevant Documents Admissible
1	Authorship	Authorship of Book on Finance or any component of Financial Planning*	10	Ongoing	Book to be completed in the validity period of 1 year.	Soft/Hard copy or link of book
		Authorship of articles in Print/Electronic Media/Financial Planning Journal	5	Ongoing	Published date of the article to be in the validity period of 1 year.	Soft/Hard copy or link of article
		Published interview in print media or interview/ panel discussion in electronic media	5	30-Sept-18	Published date/ telecast date to be in the validity period of 1 year.	Soft/Hard copy or link of interview
		Published quotes in print media or viewpoint/bite in electronic media (per article or appearance)	2	30-Sept-18	Published date/ telecast date to be in the validity period of 1 year.	Soft/Hard copy or link of article
2	Qualification	Professional Courses and Certifications (Actuary, CA, CFA, CAIIB, JAIIB, ICWA, CS)	10	Ongoing	Date of completion to be in the validity period of 1 year.	Photocopy of passing certificate /degree
		Higher Academic Qualifications (Post Graduate or Doctorate in Finance, Economics, Econometrics, Mathematics/ Statistics, Law)	10	Ongoing	Date of completion to be in the validity period of 1 year.	Photocopy of passing certificate /degree
		Licentiate/Associate/Fellowship of Life Insurance from Insurance Institute of India	5	Ongoing	Date of completion to be in the validity period of 1 year.	Photocopy of passing certificate /degree
		MBA (Finance- Part Time) /(except Finance- Full Time)	5	Ongoing	Date of completion to be in the validity period of 1 year.	Photocopy of passing certificate /degree
3	Certification /Courses	Mandatory Certifications (NISM-MF, IRDA) other relevant courses of NCFM, BSE, IIBF, NISM, etc.	2	30-Sept-18	Date of completion to be in the validity period of 1 year.	Photocopy of passing certificate
		Aspiration relevant courses of at least 1-year duration run by professional education entities	10	Ongoing	Date of completion to be in the validity period of 1 year.	Photocopy of passing certificate /degree
		LOMA Certification	5	Ongoing	Date of completion to be in the validity period of 1 year.	Photocopy of passing certificate /degree

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4	Events/ Meetings	Events, Seminars, Round Table/Conference, Financial Planning Congress, etc. and Workshops organized and /or pre-approved by FPSB India or FPCIL	5	Ongoing	Date of event to be in the validity period of 1 year.	Participation Certificate/Attendance sheet and Event Agenda
		Other events related to one of the Financial Planning components* or other relevant matters on Economy and Finance	2	30-Sept-18	Date of event to be in the validity period of 1 year.	Participation Certificate/Attendance sheet and Event Agenda
		Financial Planning Association's (FPA) Annual Convention in US	10	Ongoing	Starting Date of convention to be in the validity period of 1 year.	Participation Certificate/Attendance sheet and Event Agenda
		Meetings of the Board of FPSB India and appointed Committees	3	Ongoing	Date of meeting to be in the validity period of 1 year.	Participation Certificate/Attendance sheet and Event Agenda
		Board Meetings of entities in the BFSI sector	3	Ongoing	Date of meeting to be in the validity period of 1 quarter.	Participation Certificate/Attendance sheet and Event Agenda
5	Quiz	Quiz in the Financial Planning Journal or solving queries in the Newspapers/other journals	4	Ongoing	Month of Journal/quiz to be in the validity period of 1 quarter.	Result Sheet
6	Teaching	Training and Teaching assignments other than performed/undertaken as part of profession (Workshops, Institutes, Classroom teaching, etc.) (Full day assignment)	5	30-Sept-18	Sessions to be in the validity period of 1 quarter.	Acknowledgment letter from the College/Institute mentioning the date, topic & number of hours of lecture/training/workshop
7	Speakership	Speakership in a Seminar, Convention, Conference, etc.	3	30-Sept-18	Date of event to be in the validity period of 1 quarter.	Acknowledgment letter from the College/Institute mentioning the date, topic & number of hours of lecture/training/workshop

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8	Pro bono work	<i>Pro bono</i> work which can be classified as voluntary contribution to the community helping the deprived people with transfer of knowledge of managing one's financial affairs in a holistic manner of Financial Planning.	3	Ongoing	The construction and submission of the Financial Plan has to be in the applicable period for the award of CEP's	Copy of the Financial Plan in case of <i>Pro bono</i> work
9	Others	Participation in TV Shows/interviews	2	30-Sept-18	Date of Show to be in the validity period of 1 quarter.	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule
		Answering questions/Queries in newspaper/magazines	2	30-Sept-18	Date to be in the validity period of 1 quarter.	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule

* Components of Financial Planning: Financial Management, Asset Management, Risk Management or Insurance Planning, Tax Planning, Retirement Planning and Estate Planning

Important Points:

1	The requirement of acquiring 15 CE points (CEPs) is immediately after the issue of initial certification and falls due when the Certificants renews his/her certification at annual intervals.
2	The CEPs are to be acquired in certification period and any excess points are not carried forward in the next certification period.
3	The failure to renew on due date apart from late renewal penalty entails requirement of earning extra CEPs only beyond 6 months of due date of renewal.
4	Failure to fulfill the Continuous Education criterion within the prescribed period will result in non-renewal of CFP Certification and will also preclude any use of the CFP marks by the Certificants.
5	Unsupported, misstated or fraudulent reporting of CE credits shall be viewed seriously and may call for action by FPSB India and may be a ground for disciplinary action leading to revocation of the CFP Certification.