

**List of Activities and Programs admissible for award of Continuous Education Points (CEPs)  
for renewal of CFP<sup>CM</sup> Certification – Validity Review Period till 30<sup>th</sup> Sept, 2011**

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*	15	Ongoing	Book to be completed in the validity period	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	Soft/Hard copy or link of article
		Published interview in print media or interview/ panel discussion in electronic media	5	30-Sept-11	Published date/telecast date to be in the validity period	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-11	Published date/telecast date to be in the validity period	Soft/Hard copy or link of article
2	Qualification	Professional Courses and Certifications (Actuary, CA, CFA, CAIIB, JAIIB, ICWA, CS)	15	Ongoing	Date of completion to be in the validity period	Photocopy of passing certificate /degree
		Higher Academic Qualifications (Post Graduate or Doctorate in Finance, Economics, Econometrics, Mathematics/ Statistics, Law)	15	Ongoing	Date of completion to be in the validity period	Photocopy of passing certificate /degree
		Licentiate/Associate/Fellowship of Life Insurance from Insurance Institute of India	10	Ongoing	Date of completion to be in the validity period	Photocopy of passing certificate /degree
		MBA (Finance- Part Time) /(except Finance- Full Time)	10	Ongoing	Date of completion to be in the validity period	Photocopy of passing certificate /degree
3	Certification /Courses	Mandatory Certifications (NISM-MF, IRDA) other relevant courses of NCFM, BSE, IIBF, NISM, etc.	2	30-Sep-11	Date of completion to be in the validity period	Photocopy of passing certificate
		Aspirational relevant courses of at least 1-year duration run by professional education entities	10	Ongoing	Date of completion to be in the validity period	Photocopy of passing certificate /degree
		LOMA Certification	10	Ongoing	Date of completion to be in the validity period	Photocopy of passing certificate /degree

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4	<b>Events/ Meetings</b>	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	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	31-Dec-11	Date of event to be in the validity period	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	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	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	Participation Certificate/Attendance sheet and Event Agenda
5	<b>Quiz</b>	Quiz in the Financial Planning Journal or solving queries in the Newspapers/other journals	4	30-Sep-11	Month of Journal/quiz to be in the validity period	Result Sheet
6	<b>Teaching</b>	Training and Teaching assignments other than performed/undertaken as part of profession (Workshops, Institutes, Classroom teaching, etc.) (Full day assignment)	5	31-Dec-11	Sessions to be in the validity period.	Acknowledgment letter from the College/Institute mentioning the date, topic & number of hours of lecture/training/workshop
7	<b>Speakership</b>	Speakership in a Seminar, Convention, Conference, etc.	5	31-Dec-11	Date of event to be in the validity period	Acknowledgment letter from the College/Institute mentioning the date, topic & number of hours of lecture/training/workshop

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8	Survey Response	Completion of FPSB India's Job Analysis Survey towards restructuring syllabus topic list for CFP <sup>CM</sup> Certification Program	5	31-Mar-12	Surveys will be intimated through e-mails, will also be on FPSB India's website for specified durations.	Online submission; shall be captured in the survey data (complete submission only considered)
9	Others	Participation in TV Shows/interviews	3	30-Sept-11	Date of Show to be in the validity period	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule
		Answering questions/Queries in newspaper/magazines	3	30-Sept-11	Date to be in the validity period	Participation Certificate/Attendance sheet & Event Agenda/ Event schedule
		Grace Points	Up to 2	Ongoing	To be decided on case to case basis or recommended to attend a specified program	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 certificant 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 certificant.
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.