

How do you know if you could benefit from a CERTIFIED FINANCIAL PLANNER™ professional?

A CERTIFIED FINANCIAL PLANNER™ professional from the Financial Planning Association® (FPA®) can help you:

- Set realistic financial and personal goals
- Assess your current financial health by examining your assets, liabilities, income, insurance, taxes, investments and estate plan
- Develop a realistic, comprehensive plan to meet your financial goals by identifying financial opportunities and building on financial strengths

CFP® professionals are dedicated to using the financial planning process. To earn the prestigious CFP® certification and remain certified as a CFP® professional, individuals must meet the following requirements:

Education

They must complete a comprehensive course of study offered by a college or university program (ranging from certificate to doctoral degree levels) which covers a personal financial planning curriculum approved by CFP Board. In addition, they must have earned a bachelor's degree from a regionally accredited college or university.

Examination

CFP® professionals must successfully complete CFP Board's comprehensive examination, which tests an individual's ability to integrate and apply their financial planning knowledge.

Experience

They must acquire three years of financial planning related experience, or a limited 2-year structured option, before achieving the right to use the CFP® marks.

Ethics

They must voluntarily ascribe to CFP Board's code of ethics and additional requirements as mandated. This includes providing financial planning services as a fiduciary, or acting in the client's best interest.



Rathbone Warwick Investment Management ("The Firm") is a Registered Investment Adviser. This document is solely for informational purposes. Advisory services are only offered to clients or prospective clients where the Firm and its representatives are properly licensed or exempt from licensure. Past performance is no guarantee of future returns. Investing involves risk and possible loss of principal capital. No advice may be rendered by the Firm unless a client service agreement is in place.