



## Professional Designations Other Canadian Governing Bodies

Designation		Governing Body		Designation Renewal Date	Continuing Education (CE) Requirements					Conditions / Restrictions
Full Name	Name	Full Name	Name		Category	Minimum	Maximum	Carryover	Verifiable	
Registered Financial Planner	RFP	Institute of Advanced Financial Planners	IAFP	Annual December 31	Total	30	30	0	Yes	
					General	29	29	0	Yes	
					Ethics	1	1	0	Yes	
Financial Planner	F. PI.	Institut Québécois de Planification Financière	IQPF	2 Years - November 30, 2017	Total	40	40	0	Yes	CE is referred to as PDU (Professional Development Units)
					Financial Planning	15	15	0	Yes	Must be provided by IQPF
					7 Financial Planning Areas	15	15	0	Yes	
					Compliance & Ethical Practice	10	10	0	Yes	
Chartered Financial Analyst	CFA	CFA Institute	CFAI	Annual December 31	Total	20	20	0	No	"Voluntary CE Credits"
Certificate in Investment Performance Measurement	CIPM	CFA Institute	CFAI	3 years - December 31	Total	45	45	0	Yes	
					CE Credits	43	43	0	Yes	
					Ethics, Standards, or Regulations	2	2	0	Yes	
Trust & Estate Practitioner	TEP	Society of Trust & Estate Practitioners	STEP	Annual - April 1	Total	0	0	0	No	
Elder Planning Counselor	EPC	Canadian Initiative for Elder Planning Studies	CIEPS	1 Year - on License Date	Hold another License with a CE Requirement	0	0	0	No	If you are a licensed professional and you require CE credits to maintain your license and your licence is current we will accept that you have met the CE requirement to maintain your designation.
					Do not hold another License with a CE Requirement	0	0	0	No	If you are in a profession that does not require you to maintain Continuing Education credits you will not require formal Continuing Education confirmation to renew your EPC membership.
Registered Retirement Consultant	RRC	Canadian Institute of Financial Planning	CIFP	Annual - Dec 31	CIFP Retirement Institute Credits	10	10	0	Yes	
Certified Divorce Financial Analyst	CDFA	Institute of Divorce Financial Analysts	IDFA	1 Year - on License Date	Divorce related CE (every 2 years)	15	15	0	No	To retain the CDFA designation, you must also obtain 15 divorce-related hours of continuing education every two years
Certified Executor Advisor	CEA	Canadian Institute of Certified Executor Advisors	CICEA	1 Year - on License Date	Total (begins in the second year)	15	15	0	No	Continuing education should be in the areas of executor issues, estate planning and federal and provincial legislative changes. Time spent reviewing the regularly updated curriculum should be counted, as well as time spent reading relevant newspaper, magazine and online articles, and / or attending applicable educational sessions.