Financial Planning Standards Council
902-375 University Avenue, Toronto, ON M5G 2J5
Phone 416.593.8587 | Fax 416.593.6903 | Toll free 1.800.305.9886
inform@fpsc.ca | fpsc.ca

FPSC Exemption Application

Here is a summary of the exemptions available:

PFP

- May apply for an exemption from an FPSC-Approved Core Curriculum education program and FPSC Level 1® Examination in Financial Planning and proceed directly to an FPSC-Approved Capstone Course which will qualify them to write the CFP examination. Once their exemption is approved, these individuals may also apply to become an FPSC Level 1 Certificant in Financial Planning.

Pl. Fin. or CFP® credential from an FPSB Member in another territory

- May apply for an exemption from an FPSC-Approved Core Curriculum education program, FPSC Level 1 examination and an FPSC-Approved Capstone Course and may apply to proceed directly to the CFP examination.

CPA, CFA, CLU, Fellow of the Canadian Institute of Actuaries (FCIA), Lawyer and Quebec Notary

- May apply for an exemption from an FPSC-Approved Core Curriculum education program and may apply to proceed directly to the FPSC Level 1 examination. Those individuals who have a minimum of five years of qualifying, client facing financial planning work experience will be requested to submit further documentation for exemption from the FPSC Level 1 examination and proceed directly to an FPSC-Approved Capstone Course.

All candidates applying for exemptions must provide attestation from their governing professional body confirming their qualifications and good standing.

How to Submit Your Application

Please scan and email a completed version of this form with your supporting documents to inform@fpsc.ca. Alternatively, you may fax a completed version of this form with your supporting documents to 416.593.7412. Completed applications will take approximately 1-2 businesses days to be processed. You will be notified via email about the status of your application.

We're Here to Help

If you have any questions about this form, your exemption application or your next steps on the path to certification, please contact FPSC Stakeholder Support at inform@fpsc.ca, 416.593.8587 or 1.800.305.9886. We're here from Monday to Friday, 9:00 a.m. to 5:00 p.m. ET.

PART A | Personal Information (please print)

Name

☐ Check here if you do not have a business address.

Business Name			
Job Title			
Suite	Business Address (street number and name)		
City	Province	Postal Code	Country
Phone ( )	Ext.	Fax	
Business Email		Toll Free	Ext.

Suite	Residential Address (street number and name)		
City	Province	Postal Code	Country
Phone ( )		Fax	
Home/Personal Email			

Preferred contact information: ☐ Business ☐ Residence

From time to time FPSC will use your preferred contact information to communicate with you. Please visit online.fpsc.ca to update your contact details, or notify FPSC promptly, in writing, of any changes (including your email address, mailing address, telephone and fax numbers).

☐ Check here if you would like to opt-out of receiving informative emails from FPSC. Please note that FPSC will continue to send you communications regarding important information.

Part B | Payment

2017/18 Exemption Fee	AB, BC, MB, NT, NU, QC, SK, YT	ON	PE	NB, NL, NS, PE
	$288.75 ($275 + 5% GST)	$310.75 ($275 + 13% HST)	$313.50 ($275 + 14% HST)	$316.25 ($275 + 15% HST)

Method of Payment (select one)

* FPSC currently does not accept American Express

☐ Money Order

☐ Cheque (payable to Financial Planning Standards Council or FPSC)

☐ VISA

☐ MasterCard

Credit card information (Please print card number clearly)

Card Number

Expiry Date (MM/YY)

Name on Credit Card (Please print clearly)

Signature

Date

Business# 894829878RT