

Qualification Review Application (QRA)

This application should be completed by candidates who hold a qualification or examination which is not currently listed within the CFP^{CM} Certification Entry Requirements document.

To be eligible to embark on the process of becoming a CFP^{CM} Professional there are three compulsory criteria which must be met:

1. A minimum of three years' experience of financial services
2. An FSSC Appropriate Examination for Advising on Packaged Products
3. An examination pass in each of the following areas:
 - Financial Planning
 - Taxation
 - Advanced Technical Areas

Candidates must be able to clearly demonstrate appropriate knowledge skills in each of the three required criteria. This application must be fully completed and returned to the IFP together with the syllabi relevant to your qualification and an administration fee of £20.

Your Details	
Full Name:	
Address:	
Email Address:	
Contact Number:	

Employer Details	
Company Name:	
Position in company:	
Length position held:	
Address:	



Qualifications Held

Please attach a copy of the relevant qualification syllabus. Any applications received without the relevant syllabus will not be considered by the IFP Education Committee.

Qualification and Examining Body (e.g CFP ^{CM} Certification – IFP)	Date Gained	Knowledge Area Covered (please tick one area only)		
		Financial Planning	UK Taxation	Advanced Technical



Payment

In order for your application to be considered we request a payment of £20 to cover the associated administration costs. Any application submitted without this payment will be rejected.

- Cheque (*cheques should be made payable to 'Institute of Financial Planning'*)
 MasterCard VISA Other (Amex not accepted): _____

If paying by credit card, please complete and sign below:

Name On Card: _____

Card Number: _____

Expiry Date: _____

3 Digit Security Code: _____

Cardholder Signature: _____

Please note: Upon receipt of this application you will receive a confirmation email. Please then allow between 8 – 12 weeks for a decision from the IFP Education Committee.

Return To:

Training Coordinator
Institute of Financial Planning
Whitefriars Centre
Lewins Mead
Bristol
BS1 2NT

Tel: 0117 945 2470
Fax: 0117 929 2214
Email: enquiries@financialplanning.org.uk

Office Use Only:

Date received:
Receipt issued:
Case Number:
Date to Education Committee:
Date response sent to candidate:



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