



UNIVERSITY
OF MANITOBA

Asper School of Business
Faculty of Management

Department of Accounting and Finance
181 Freedman Crescent
Winnipeg, Manitoba
Canada R3T 5V4
Telephone (204) 474-9362
Fax (204) 474-7545

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Information for Students Interested in the Personal Financial Planning Program at the University of Manitoba:

The University of Manitoba, Bachelor of Commerce program, is the only Manitoba institution registered directly with the Financial Planners Standards Council that qualifies individuals to sit the CFP Examination offered twice yearly in June and November. Some of the other universities across the country that are similarly registered include the following: Wilfrid Laurier University, Université Laval, University of Québec - Montreal, among others. Some of the other universities offer special certificates in addition to the courses required for the CFP exam. Manitoba students receive the courses, the recognition of their Bachelor of Commerce (Honours) degree and their declared major (the CFP courses would likely be taken through the Finance Major with a few additional Business Options).

The courses required by us to qualify for the CFP Exam are as follows:

- ECON 1200 Principles of Economics
- GMGT 3300 Commercial Law
- ACC 1100 Introductory Financial Accounting (C+ or above required)
- FIN 2200 Corporation Finance (C+ or above required)
- FIN 3410 Investments
- ACC 3050 Taxation Accounting
- FIN 3270 Personal Financial Planning
- FIN 4230 Personal Financial Planning II

Note that access to the above courses is only really feasible for students already admitted to the Bachelor of Commerce (Honours) program as many of the above courses are full after all B. Comm. students have registered. Other students already in University of Manitoba programs may attempt to register in these courses subject to space and having obtained the appropriate prerequisites. The above courses are NOT offered by distance education. Non-University students should utilize one of several national education providers for the CFP courses; some of those are via distance education.

The following information was copied from the FPSC website (http://www.cfp-ca.org/public/public_cfpinternationally.asp) and explains the role of the FPSC, FPSB and CFP:

The Financial Planning Standards Board (FPSB) protects financial planning consumers around the world and fosters professionalism in financial planning through the ongoing development and enforcement of relevant international competency and ethics standards. FPSB also promotes greater global recognition of CFP certification and its related marks as the international hallmarks of financial planning professionals by establishing, upholding and promoting worldwide professional standards in financial planning. For more information, visit www.fpsb.org.

Canada's FPSC and the 16 other non-profit associations that together manage CFP certification for CFP professionals in 17 countries have joined as members of FPSB. The new international organization purchased the CFP certification and service marks outside the U.S. and its territories from Certified Financial Planner Board of Standards Inc. (CFP Board), Denver, Colorado. FPSB and CFP Board recognize their shared interest and responsibility in advancing the standards of the CFP certification program in their respective territories and have agreed to cooperate in this effort. There are currently more than 90,000 CFP professionals internationally.

Recognized for the success and integrity of its domestic CFP certification program, Canada's FPSC will continue to play an influential role internationally. Numbering more than 16,000, CFP professionals in Canada represent the largest number of CFP professionals among the FPSB affiliates and the largest proportion on a domestic per capita basis in the world.

The following websites may also be of interest:

FPSC (Canada) Home Page: <http://www.cfp-ca.org/index.asp>

Educational Providers: http://www.cfp-ca.org/candidates/candidates_educationproviders.asp