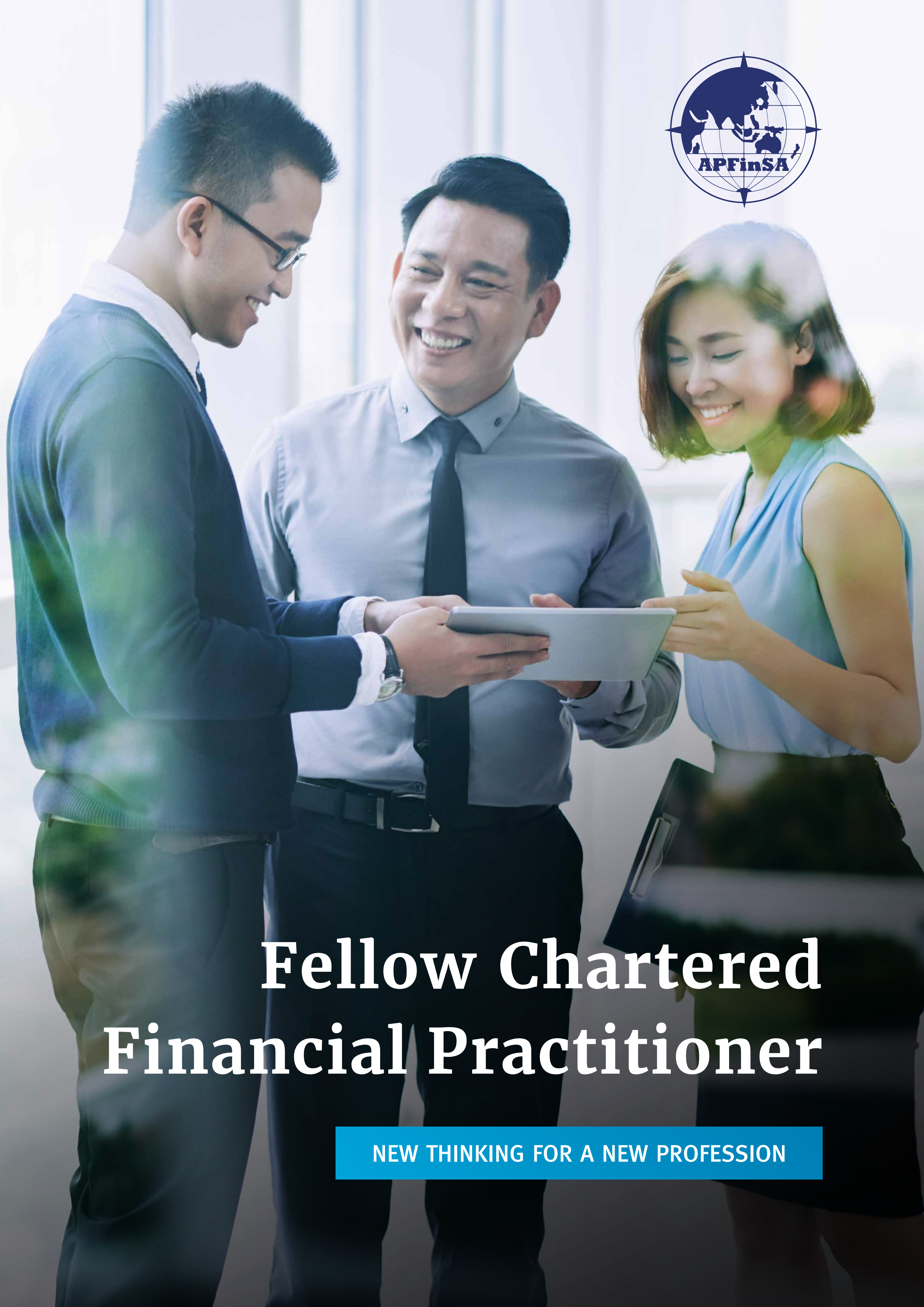


Fellow Chartered Financial Practitioner

NEW THINKING FOR A NEW PROFESSION

Welcome to APFinSA

The Asia Pacific Financial Services Association (APFinSA) is the largest financial services council in the Asia-Pacific. Established in 1991, APFinSA represents the voice and interests of over 100,000 financial services professionals from member countries. As an international advice community, APFinSA serves as the leading cross-border association, acknowledging critical issues and opportunities that face the financial advice profession in the region.

APFinSA collaborates with country member associations to promote higher education and professional standards for financial advisers through its International Certifications and Standards Board (ICSB).

Kaplan Professional

Kaplan is one of the world's largest and most diverse education providers. As a global leader in lifelong learning, Kaplan operates in over 30 countries and helps over one million students achieve their educational and career goals each year.

In Australia, Kaplan Professional is at the forefront of practical and relevant education and training, providing services to over 45,000 individuals annually. Kaplan Professional is renowned for the quality of its programs, dedicated student support and flexible online learning. This progressive and customer-focused approach has cemented Kaplan Professional's reputation as the trusted corporate partner to many major institutions in the country.

KAPLAN
PROFESSIONAL

Fellow Chartered Financial Practitioner

The Fellow Chartered Financial Practitioner (FChFP) Certification is a new international education benchmark for financial services professionals. Designed to provide you with the essential skills and knowledge to excel within the financial advice profession, the FChFP Certification balances academic rigour with applied practice development. The innovative curriculum will challenge and redefine how you think about professional education.

FChFP
Fellow Chartered Financial Practitioner

The FChFP Certification

Overview

The FChFP Certification introduces financial services practitioners and executives to the participants, products, markets and regulatory environment for the financial services industry in Vietnam. Students will gain an understanding of the step-by-step process of providing professional financial advice to clients in areas of investments, insurance, retirement and estate planning. The assessments encourage progressive learning and develop technical, interpersonal, ethical and client engagement skills, enabling individuals to build their knowledge and skills as they move through the course.

Learning Outcomes

1. Confidently apply the six-step financial planning process to enhance your client conversations.
2. Analyse different client scenarios and outline the characteristics and risks associated with securities and managed investments.
3. Explain the importance of life insurance and tax implications for your client and determine appropriate risk protection strategies.
4. Explain the various types of rules and benefits of retirement planning for your client.
5. Identify why estate planning is an essential part of financial planning and the planner's role in the process.

Subjects

Subject 1:	Financial Planning Fundamentals
Subject 2:	Investment Planning
Subject 3:	Insurance & Risk Management
Subject 4:	Retirement Planning
Subject 5:	Fundamentals of Estate Planning
Subject 6:	Presenting a Financial Plan (Capstone)

Entry requirements:

Candidates must be licensed by an approved financial institution and have a minimum of three (3) years of relevant experience.

Course Duration:

Course duration is three (3) years. Candidates must not exceed the course progression timeframe of five (5) years. All subjects need to be completed in ascending order.

Completion:

FChFP Certification will be awarded by APFinSA to candidates upon successful completion.

Code of Ethics:

All individuals are bound by a Code of Ethics and Professional Standards, and are to uphold the behaviours and ethical standards of a Fellow Chartered Financial Practitioner.

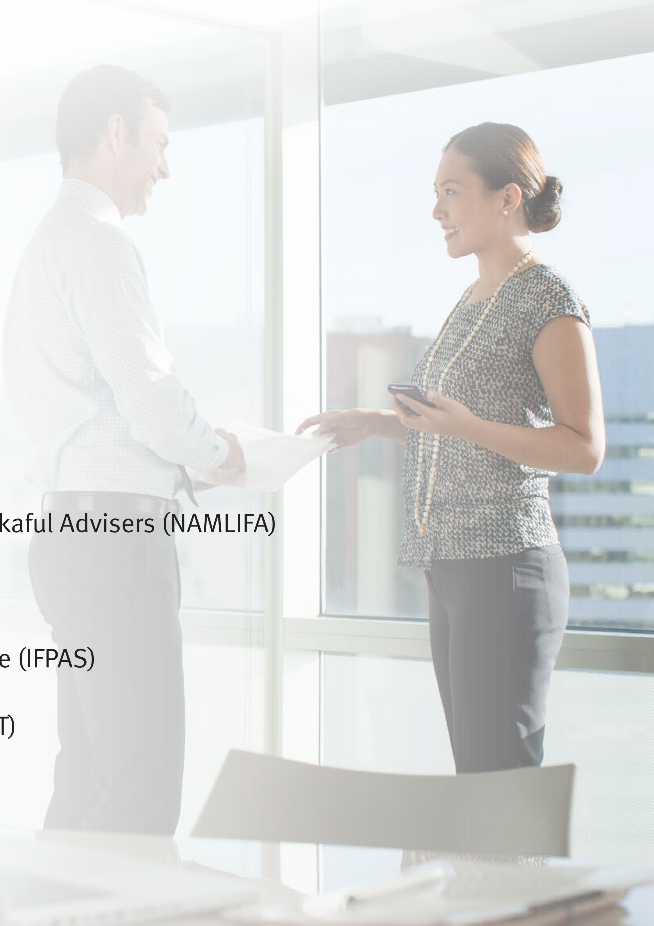
Assessment:

Five (5) multiple choice quizzes, one (1) assignment, one (1) presentation and one (1) exam.

Delivery Mode:

Blended learning, including face-to-face lectures delivered by international and local practitioners, and online tools and resources supported by Kaplan Professional's Learning Management System.

A new education benchmark for financial services professionals



APFinSA Member Countries

Australia: Association of Financial Advisers (AFA)

Hong Kong: Life Underwriters Association of Hong Kong (LUAHK)

India: Life Underwriters Guild of India (LUGI)

Macau: Macau Insurance Agents and Brokers Association (MIABA)

Malaysia: National Association of Malaysian Life Insurance and Family Takaful Advisers (NAMLIFA)

Philippines: Life Underwriters Association of Philippines (LUAP)

Singapore: Insurance and Financial Practitioners Association of Singapore (IFPAS)

Taiwan: Insurance and Financial Practitioners Association of Taiwan (IFPAT)

Thailand: Thai Association of Insurance and Financial Advisors (THAIFA)

Take the first step along your FChFP journey

Asia Pacific Financial Services Association

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APFinSA