

# CFP™ Certification Renewal Form

You can complete this form electronically and sign with your electronic signature



1. I would like to renew as a **CERTIFIED FINANCIAL PLANNER™ Professional**

CISI Candidate/Membership number (if applicable) \_\_\_\_\_ FCA Number (if applicable) \_\_\_\_\_

CFP™ Certification ©2025

## 2. Personal details

Title \_\_\_\_\_  
First name(s) \_\_\_\_\_  
Last name \_\_\_\_\_  
Home address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Tel. (include country and local code) \_\_\_\_\_  
Mobile \_\_\_\_\_  
Email \_\_\_\_\_  
Date of birth DD/MM/YYYY \_\_\_\_\_  
Former name(s) if any \_\_\_\_\_

## 3. Work details

Firm name \_\_\_\_\_  
Job title \_\_\_\_\_  
Department \_\_\_\_\_  
Firm address \_\_\_\_\_  
\_\_\_\_\_  
Postcode \_\_\_\_\_  
Tel. (include country and local code) \_\_\_\_\_  
Email \_\_\_\_\_

## 4. CFP™ Professionals

### CPD Declaration

I confirm I have completed 35 hours CPD in the last 12 months which is recorded on the CISI CPD scheme.

## 6. Disciplinary History

Have you been the subject of any complaints (as defined by the FCA) in the past 12 months?  Yes  No

If Yes, please could you provide the following information with your application form

- A brief summary of the complaint;
- If the complaint was upheld;
- If there was a settlement agreed with the client;
- If the complaint was reported to the FOS;
- If the FOS upheld the complaint or if the complaint is still pending.

Have you ever been convicted of a criminal offence or been a defendant in criminal proceedings?  Yes  No

Have you entered an Individual Voluntary Agreement (IVA) or equivalent agreement with your creditors or been adjudged bankrupt or insolvent or compounded with your creditors?  Yes  No

*Please note that you do not need to disclose convictions that are spent under the Rehabilitation of Offenders Act 1974, or protected convictions that are filtered from a standard or enhanced Disclosure and Barring Service (DBS) check.*

## 6. Declaration

1. As a member of the Chartered Institute for Securities & Investment I agree to abide by the Royal Charter, Bye-laws, Regulations, and to uphold its high standards as published in its Professional Code (all available from website). Any breach of the Regulations may give rise to disciplinary procedures and termination of my membership.
2. I agree to adhere to the marks usage guidelines for the CFP™ marks and other member designations, and understand that non-compliance with any of the above can trigger disciplinary action, and I understand that the CISI has the right to refuse and revoke my right to use the CFP™ mark and other designations where applicable and should this happen I agree that I will stop using the CFP marks.
3. I agree to maintain competence through CPD by completing 35 hours CPD with a minimum of 21 hours being structured annually.
4. I understand that by holding the CFP™ certification that my personal data will be shared with the Financial Planning Standards Board Ltd.

Signature: \_\_\_\_\_

Name in full: \_\_\_\_\_ Date: \_\_\_\_\_

Please return your application form to: **CFP™ Certification**  
Chartered Institute for Securities & Investment, 20 Fenchurch Street, London EC3M 3BY or scan and email a copy to [cfp@cisi.org](mailto:cfp@cisi.org)

CFP™, CERTIFIED FINANCIAL PLANNER™ and CFP™ are certification marks owned outside the U.S. by Financial Planning Standards Board Ltd. Chartered Institute for Securities & Investment is the marks licensing authority for the CFP marks in the United Kingdom, through agreement with FPSB.