

# Chartered Fellow (Financial Planning)

## 1. What are the criteria to apply for Chartered Fellow (Financial Planning)?

Chartered Fellow (Financial Planning) is a CISI membership grade that compliments your CFP™ Certification, which is recognised globally as the gold standard for financial planning professionals.

In order to apply for Chartered Fellow (Financial Planning) you must meet one of the following options:

### CERTIFIED FINANCIAL PLANNER™ (CFP™) certification holders via Level 7 Diploma in Advanced Financial Planning

Qualification/ Certification	IntegrityMatters	+ CPD Years at Member Level	Eligible for Chartered Membership	+ CPD Years	Eligible for Chartered Fellow (Financial Planning)
CFP™ professional via Level 7 Diploma in Advanced Financial Planning	✓	1 as a Member	✓	+ 2 as a CISI Member or CISI Chartered Member	✓
CFP™ professional via Level 7 Diploma in Advanced Financial Planning	✓	1 as a Member	✓	+ 1 as a CISI Member or CISI Chartered Member + 2 as a Chartered Member of a relevant Chartered body *	✓
CFP™ professional via Level 7 Diploma in Advanced Financial Planning	✓	1 as a Member	✓	+ 3 as a Chartered Member of a relevant Chartered body *	✓

### Window of Opportunity for CERTIFIED FINANCIAL PLANNER™ (CFP™) certification holders via Level 6 Diploma in Financial Planning

Qualification/ Certification	IntegrityMatters	+ CPD Years at Member Level	Eligible for Chartered Membership	+ CPD Years	Eligible for Chartered Fellow (Financial Planning)
CFP™ professional via Level 6 Diploma in Financial Planning	✓	1 as a Member	✓	+ 2 as a CISI Member or CISI Chartered Member	✓
CFP™ professional via Level 6 Diploma in Financial Planning	✓	1 as a Member	✓	+ 1 as a CISI Member or CISI Chartered Member + 2 as a Chartered Member of a relevant Chartered body *	✓
CFP™ professional via Level 6 Diploma in Financial Planning	✓	1 as a Member	✓	+ 3 as a Chartered Member of a relevant Chartered body *	✓

*\*This must have been logged in the consecutive years immediately preceding your CISI membership.*

CISI Chartered Fellows who are CFP™ professionals via either the Level 7 Diploma in Advanced Financial Planning or the Level 6 Diploma in Financial Planning are eligible to apply for Chartered Fellow (Financial Planning) without any additional requirements. CFP™ professionals with the Level 6 Diploma in Financial Planning must apply within the window of opportunity timeframe (6 June 2022 - 11 June 2023).

2. When can I apply for Chartered Fellow (Financial Planning)?	The new membership grade Chartered Fellow (Financial Planning) will come into effect from <b>6 June 2022</b> . You will be able to apply for this new grade as soon as you meet the criteria.
3. How do I apply?	You will be required to complete the Chartered Fellow (Financial Planning) Application Form, or if you are applying under the Window of Opportunity, complete the Window of Opportunity Form.
4. What evidence do I need to provide to prove that I have completed CPD with another relevant Chartered Body?	You will need to provide written confirmation of your relevant membership history with the relevant Chartered Body, this should be included with your application.
5. Who are the accepted relevant Chartered Bodies I can bring my CPD years from?	<p>There are three Bodies we would accept CPD years from:</p> <ol style="list-style-type: none"> <li>1. Chartered Insurance Institute (CII)</li> <li>2. The London Institute of Banking &amp; Finance (LIBF)</li> <li>3. Chartered Banker Institute</li> </ol>
6. I am a CFP™ professional, but if I have not passed the CISI Level 7 Diploma in Advanced Financial Planning qualification, can I still apply?	Yes, you can apply under the Window of Opportunity. You will need to meet the relevant CPD requirements and apply using the Window of Opportunity Form.
7. When does the Window of Opportunity close?	For members who hold CFP™ Certification via the Level 6 Diploma in Financial Planning and who have successfully logged 3 years CPD as a Member or above, the Window of Opportunity will remain open until <b>11 June 2023</b> .
8. Can I hold both the Chartered Fellow and Chartered Fellow (Financial Planning) membership grades?	No, you will only be able to hold one membership grade with the CISI.
9. Will I still be able to keep my Chartered Wealth Manager Title?	Yes, this will not affect your Chartered Wealth Manager Title.
10. I have a non-UK CFP™ Certification, can I still apply?	To apply for the Chartered Fellow (Financial Planning) designation, you must hold the UK CFP™ Certification via the Level 6 Diploma in Financial Planning or Level 7 Diploma in Advanced Financial Planning. For more information, please contact <a href="mailto:cfp@cisi.org">cfp@cisi.org</a>
11. Do I have to complete 35 hours CPD annually to maintain my Chartered Status?	Yes, as a Chartered member you will be required to continue to maintain your CPD requirements of completing 35 hours CPD, to be recorded on the CISI CPD Scheme or CISI Firm Accredited Scheme annually.
12. If I meet the CPD requirements and become a Chartered Fellow (Financial Planning) am I able to continue recording my CPD with the relevant Chartered Body?	CPD undertaken as a Chartered Member of a relevant body can only be used to apply for Chartered Fellow (Financial Planning), but to maintain your Chartered Status of the CISI you will be required to successfully complete 35 hours CPD annually on the CISI CPD Scheme or CISI Accredited Firm Scheme.