



E-Blast News

Financial Planners Standards Council

902 - 375 University Avenue . Toronto, Ontario . M5G 2J5 Canada
 Tel: 416.593.8587 Toll Free: 1.800.305.9886 Fax: 416.593.6903
 E-mail: inform@fpfccanada.org Web site: www.fpfccanada.org

March 2008

Table of Contents

Survey of Canadians shows financial planners valued	Feature Article needed for March
Don't forget to order your consumer brochures	New CFP Professionals website up
Need good help? Find it on FPSC job site	Deadline for Licence Renewal near
New FPSC Forums ready	Keep on top of economic trends
Successful examination writers	FPSC and CFP professionals in the news

Survey of Canadians shows financial planners valued as highly as lawyers and accountants

In an FPSC-sponsored survey of Canadians, a majority of respondents indicated they value financial planners to the same degree as lawyers and accountants.

Strategic Counsel conducted the survey on behalf of FPSC to examine the attitudes of adult Canadians (excluding Quebec) with incomes of \$80,000 or more on the value of services offered by financial planners. It was conducted between December 15, 2007 and January 7, 2008.

We're still analyzing the results and will publish the highlights in an upcoming *FPSC Bulletin*.



Feature Articles Needed for March on the new TFSA

Calling all authors. We're looking for your best writing and best thoughts on the new Tax-Free Savings Account (TFSA). From the entries, the March Feature Article for FPSC's online [Learning Centre](#) will be selected.

April's Theme: Financial Tips for New Canadians

New Canadians continue to arrive in this country in large numbers, seeking opportunity. But often it is a time of huge upheaval, a time when good plans need

to be made, and including financial plans. How would you advise them to start? That's April's theme.

May's Theme: Spring into Financial Planning

Spring is a time for renewal — cleaning up the clutter and starting afresh. What are your top tips for Canadians wanting to rid themselves of some of the psychological clutter that is holding them back from getting their finances in order (e.g. procrastination, fear of failure) so that they can get a fresh start on meeting their short and long-term goals?

Deadlines

- MARCH: Taking advantage of the new TFSA
DEADLINE: March 14
- APRIL: Financial Planning Tips for New Canadians
DEADLINE: March 26
- MAY: Spring into Financial Planning
DEADLINE: April 18

Send your articles expressing your original ideas that offer readers insight into the expertise of our community of talented and skilled CFP professionals to communications@fpfccanada.org. We'll consider them for selection as FPSC's online Learning Centre's March, April and May's Feature Articles of the Month. There's a \$500 award for the author of the winning submission. Please read our [writer's guidelines](#) before you submit your entry.

Learning Centre

We consider all Feature Article submissions for possible posting on the Learning Centre and are happy to receive written submissions on financial planning topics of broad interest at any time during the year. [Learning Centre](#) is FPSC's online resource for consumers seeking relevant and unbiased information on financial planning. Here you'll find, among many resources, articles written by CFP professionals.

While you're at the Learning Centre, take a look at the other resources your clients might find helpful. Resources include:

- A digest of books
- Links to other websites of value
- Financial Planning Self-Test
- Ask an Expert
- Event and Seminar Calendar
- Educating youth
- Consumer brochures



Boost your marketing with FPSC

Look for FPSC's [brochures order form](#) in the envelope with your FPSC4 licence renewal receipt.

Questions like "What is financial planning? And why do I need it?" are compellingly answered in these brochures that you'll find can complement your marketing and educational campaigns.

Remember: if you order all three, you get free pocket-folders to hold them that have a place in which to insert your business cards.



New CFP Professionals website section offers easy access to key information

Improved navigation to core CFP professional services, enhanced [discussion forums](#) for exchanging business solutions and ideas, and a [Job Site](#) that links professionals with students are just a few of the new features developed just for you in the [CFP Professionals](#) section of FPSC's website.

You can now get where you're going faster with the improved navigation and a landing page that helps you find the information most commonly sought by the CFP professional community. You now have quick and easy access to where you can:

- Engage your fellow professionals in [discussion forums](#) and solve problems, share expertise
- View and update your personal information on FPSC Online Services
- Renew your FPSC licence
- Learn more about continuing education credits
- Report continuing education credits
- Learn more about volunteer opportunities
- Send a job for posting
- Order FPSC brochures

If you have ideas or comments on the new section, please send them along to communications@fpsccanada.org. We'd love to hear from you.



Need good help? Find it on FPSC job site

FPSC's re-launched [Job Site](#) is where you can list employment, internship, and co-op opportunities for CFP professionals and Student Associates looking for those special opportunities. If you'd like to post a job on the site, email FPSC Communications Specialist Will O'Neill at woneill@fpsccanada.org.

The Student Associate (SA) program was developed last fall. Its mission is to nurture an understanding of what a career in financial planning is all about among students in financial-planning related courses, and to help them along the path to CFP certification. The program now has more than 400 participants. Please keep this pool of talent in mind.

Look for the special *Globe & Mail* insert on March 11. It's all about you, CFP certification and FPSC. Go to the FPSC website under Our Advertising to view the [.pdf file](#).



Don't forget to renew your licence

Have you renewed your FPSC licence for 2008/2009? If you still need to renew visit [FPSC Online Services](#) and login using your Registrant I.D. (formerly your licence number) and password. Your licence expires March 31st.

Applications received in FPSC's office after this date will be subject to late fees regardless of post-mark.



New FPSC Forums: a place for CFP professionals to share real-world expertise

Imagine an online service that allows you to tap into the experience, advice and views of your professional community on such issues as business software solutions, selling your book of business, writing engagement letters or moving from a commission-based system to a fee system. This is just some of the potential of the new [FPSC Forums](#). If you have a question, a professional colleague somewhere in Canada might just have the answer. Think of it as a network in which to share expertise and professional views with more than 17,000 other CFP professionals. All you have to do is use it.

With posting rights exclusive to CFP professionals and Student Associates, the forum is an ideal space to be instantly connected with those who possess or are actively pursuing CFP certification. Professionals can share solutions, discuss the issues of the day, and Student Associates can learn more about the industry and CFP certification from those on the front lines. The networking opportunities are infinite.

By logging onto the site, you'll have done all you need to join the conversation — our forum login is fully integrated with the rest of the site, so separate registration is not necessary.

Finally, don't be shy! If you have a great topic — start a thread. All we ask is that you remain respectful and professional at all times.



Keep ahead of economic trends in 2008 with RBC webcast

CFP professionals can gain insights into where the Canadian economy is going in 2008 through a free, web-based economic forecast from RBC's Assistant Chief Economist Derek Holt. Mr. Holt looks at current and expected global and national economic and financial market conditions. There's a particular emphasis on the

challenges facing the economies of Ontario and Canada. Through this webcast you'll gain an expert's perspective on:

- interest rates and where they are going
- currency valuations and where the (Canadian) dollar is heading
- entertaining the 'R' word," in both the US and Canada. Learn what impact a recession — either for our neighbour or homegrown — will have on areas such as consumer confidence, the housing market and the manufacturing sector

To [register](#) to hear "The Canadian Economy in 2008" sign in with your e-mail address and then launch presentation. Also, take a look at other upcoming events and let us know if you have an event for this site.



Successful CFP examination writers ready for next step

FPSC administered the first CFP Examination based on the *CFP Professional Competency Profile* this past November.

Eight hundred and fifteen (815) individuals wrote the examination on November 17, 2007, and 45 per cent (365) passed. Of those writing the exam for the first time, 52 per cent passed. Of the 365 who passed, 243 have already met all other CFP certification requirements including relevant experience and are now licensed to use the CFP marks.

The six-hour CFP Examination is administered in both official languages twice a year. The November examination was held in 51 centres across Canada. The next scheduled sitting of the CFP Examination is on June 14, 2008.



Banner months for FPSC and CFP professionals in the media

FPSC staff have been busy finding and encouraging CFP professionals to help journalists and producers tell their stories to Canadians hungry for good information on personal financial issues. In the most recent three months (December, January and February), there was a combined total of 198 media mentions of FPSC and CFP professionals.

Jan/Feb Media Coverage: selected highlights

GLOBAL TELEVISION - FEB 19

Gordon Ross, Patrick Murphy, Kevin Cork, Tina Buckthorp, Peter Ficek, Martin DeArtola and Larry Laderoute participated in an RRSP Helpline answering more than one hundred calls and offering RRSP and financial planning advice.

OMNI TELEVISION - FEB 18

Susan Stefura, CFP, was interviewed with her children talking about financial planning. The program will air several times in March.

THE NATIONAL POST - FEB 16

CFP professionals from across the country were featured in a spread called "RRSP Worst Mistakes". Insights were offered by CFP professionals Jamie Golombek, Stephen Haynes, Kevin Cork, Dan Hallett, Steve Geist, Warren Baldwin, Biljana

Manojlovic, Laurie Stephenson and Al Nagy.

BNN TV - FEB 14

CFP professionals Scott Plaskett, Sucheta Rajagopal, Kurt Rosentreter, Frank Wiginton, Ted Rechtshaffen, Tina Tehranchian, Cynthia Kett, Graeme McPhaden and Jonathan Sceeles did money make-overs and discussed various financial planning topics.

THE VANCOUVER SUN - FEB 13

Peter Ficek CFP was interviewed on the subject of tax credits for grandparents raising grandchildren.

METRO NEWS - FEB 11

Tina Tehranchian CFP was featured talking about some of the best financial planning ideas for new Canadians.

THE TORONTO STAR - JAN 24

Scott Plaskett CFP was quoted in an article that looked at RRSPs.

CTV - JAN 21

David Salloum CFP was quoted on CTV on holding on in rough economic times.

GLOBAL TV CALGARY - JAN 10

Peter Ficek, CFP was quoted on Global TV Calgary on retirement planning.

TORONTO BUSINESS TIMES - JAN 7

Jeanette Brox CFP and Cynthia Kett CFP were quoted in *Toronto Business Time*.



.....

Financial Planners Standards Council (FPSC) is a not-for-profit organization established in 1995 to lead the development of the financial planning profession. FPSC develops and enforces the most rigorous standards in financial planning competency and ethics for individuals who hold CERTIFIED FINANCIAL PLANNER® certification in Canada. These individuals are licensed by FPSC to use the registered marks: CFP®, CERTIFIED FINANCIAL PLANNER® and CFP (with flame logo)®. There are currently more than 17,000 CFP professionals in Canada and almost 112,000 individuals who have earned CFP certification in 20 countries around the world.