

General CE - Does not need to be accredited by FP Canada to meet FP Canada's requirements.

The General CE category includes activities related to financial planning, financial advice or services, or the financial services industry, as well as Giving Back activities.

Acceptable activities in this category include authoring financial planning articles or texts, teaching in a financial planning field, or completing CE related to a financial services designation or license. In addition, CE, which previously qualified in the categories of Practice Management and Product Knowledge may qualify in the category of General CE.

CE which was accredited in the former CE categories of Practice Management or Product Knowledge may now be categorized and accredited as General CE.

Practice Management

Qualifying CE includes the knowledge and skills used in growing and maintaining a professional practice. CE in this category may include activities focused on the financial planning process development, business planning, and business development.

Product Knowledge

Qualifying CE includes the product knowledge that planners may use to advise on and sell products or comment on products held by their clients. CE in this category may be focused on any financial planning product, including investment, insurance, or debt. CE should present a balanced view of the product that includes features and benefits as well as client suitability, risks, and costs. The content of CE should help certificants make product recommendations based on the fit of the product with their client's situation

Giving Back - Does not need to be accredited by FP Canada to meet FP Canada's requirements.

CE in the Giving Back category now qualifies as General CE. Qualifying CE includes volunteering with FP Canada, community organizations, industry associations and charitable groups to help Canadians understand the importance of financial planning or enhance their financial well-being.

Certificants may claim credits in the category of Giving Back for pro bono financial planning activities and/or volunteering with FP Canada, community organizations, industry association or charitable groups that help Canadians understand the importance of financial planning.

For details regarding qualifying activities refer to the [QAFP Certification Policies](#) and [CFP Certification Policies](#)