

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 *	✓

2. How do I apply?

You will be required to complete the **Chartered Fellow (Financial Planning) Application Form**.

3. 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.

4. Who are the accepted relevant Chartered Bodies I can bring my CPD years from?

We will accept CPD years from the following Bodies:

1. Chartered Insurance Institute (CII)
2. The London Institute of Banking & Finance (LIBF)
3. Chartered Banker Institute

5. 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.

6. Will I still be able to keep my Chartered Wealth Manager Title?

Yes, this will not affect your Chartered Wealth Manager Title.

7. 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 7 Diploma in Advanced Financial Planning. For more information, please contact cfp@cisi.org

8. 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.

9. 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.

10. Am I eligible to apply if I hold the CFP Certification via the Level 6 Diploma in Financial Planning?

For those who achieved the Level 6 Diploma in Financial Planning prior to 11 June 2019 there was a window of opportunity for applications, which closed on 16 June 2023.

If you achieved the Level 6 Diploma in Financial Planning after 11 June 2019, you are eligible to apply for Chartered Fellow (Financial Planning) for up to three years after completing your qualification, provided you are a current CFP holder.

Please contact customersupport@cisi.org for further information