

Becoming a CFP^{CM} Professional in New Zealand if you hold a CFP designation elsewhere

CFP^{CM} certification in NZ

Financial Advice NZ is the licensed authority for CERTIFIED FINANCIAL PLANNER^{CM} (CFP^{CM}) mark in New Zealand through its agreement with the Financial Planning Standards Board (FPSB).

Unfortunately there is no method of ‘transferring’ your overseas CFP mark to New Zealand.

To gain the mark in New Zealand, once you have met the legal requirements to practice as a financial adviser or Financial Advice Provider you can embark on the journey to attain your New Zealand CFP Professional certification.

Step 1: Meet the legal requirements to work as a [financial adviser](#) in New Zealand.

Step 2: [Join Financial Advice NZ](#) as an Adviser Member

Step 3: Apply to join the New Zealand CFP certification programme

At this stage the Financial Advice NZ Certification Committee will ask to see:

- a) A letter from your previous territory stating you are member with the CFP mark in good standing.
- b) Your CV, showing your relevant work experience.
- c) Your qualifications – these will be assessed against NZ standards.
- d) Your Continuous Professional Development (CPD) log that demonstrates you meet the CPD requirements of the mark – namely 60 hours CPD over a two year rolling period, of which 30 hours need to be structured CPD and the balance either structured or unstructured learning.

Step 4: Enter into an approved 12 months of supervised experience under a New Zealand CFP Professional or submit a Portfolio of Experience. If you would like more information about this step, please request it.

Step 5: All overseas CFP Professionals at a minimum need to complete the 15 credit [Massey University paper, Estate and Tax Planning](#) (110.380) paper. This can be met concurrently with Step 4.

Final Step: Once all other steps have been successfully complete, sit and pass the final NZ assessment – currently this is the submission of a Financial Plan based on a case study set by the Certification Committee.

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If you have any queries about this process, please email info@financialadvice.nz