

# Fellow Chartered Financial Practitioner



The **power** to achieve your vision

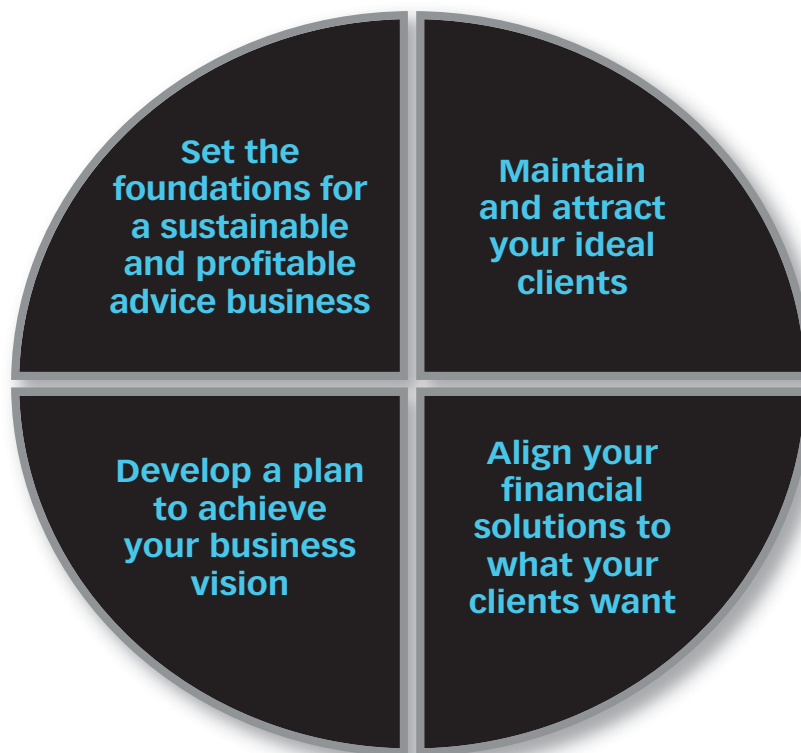
## AFA Executive Education

### The AFA's FChFP designation turns academic study into practical business applications

The Association of Financial Advisers highest educational designation is the Fellow Chartered Financial Practitioner (FChFP). The designation is awarded through the Asia Pacific Financial Services Association (APFinSA) and is recognised by all 11 member countries. The Asia Pacific region is Australia's most important neighbours, both geographically and economically, and the AFA is a country member.

The AFA's FChFP Program is designed to provide you with a comprehensive and innovative business framework for helping you achieve the business that you want. The practical knowledge areas and business projects of the FChFP are designed by leading practitioners that will deliver the power to achieve your vision.

### FChFP designation is powered by four key business outcomes



*"The FChFP Designation is a mini MBA for the financial advice profession"*

**Dennis Maddern** Chairman  
Maddern Financial Services



*"The business based projects of the FChFP are not your normal assignments; they are based on your business and are more hands-on"*

**Debra Morrow**  
Retirement Services  
Manager Vision Super





The AFA's FChFP designation is about leadership education for financial advisers. Leadership is about anticipating change, not reacting to it.



**The FChFP designation provides you with a comprehensive and innovative business framework - helping you achieve the business you want.**

<b>AFA 1</b> <b>Ethics and Compliance</b>	<b>Sustainable businesses are built on strong foundations</b>  Build a more robust and sustainable business by identifying the key risks to your business and implementing a risk management plan to deal with an uncertain future. The focus of this knowledge area is the practical application of ethics, professionalism and compliance in an advice practice.	<b>Business Project:</b>  Risk Management Plan
<b>AFA 2</b> <b>Client Engagement and Advice Process</b>	<b>Build your business by attracting and retaining more ideal clients</b>  Attract more ideal clients by developing a marketing plan that identifies the type of people in your target market, truly understands what is important to them and the problems they are looking to solve, and then delivers the most appropriate solution.	<b>Business Project:</b>  Marketing Plan
<b>AFA 3</b> <b>Applying Financial Solutions</b>	<b>Align your solutions to the outcomes your clients want</b>  Improve the manner in which you communicate your advice solutions by developing a client document that clearly articulates the outcome to the client from implementing your advice strategies.	<b>Business Project:</b>  Client Advice Document
<b>AFA 4</b> <b>Managing an advice business</b>	<b>Develop a plan to achieve your business vision</b>  Develop a plan to achieve your business vision. A lot of businesses have a plan, but few review, update and implement it. Does your business plan react to change or anticipate it?	<b>Business Project:</b>  Business Plan

## Start your pathway to becoming a Fellow Chartered Financial Practitioner

The AFA has a fundamental belief in lifelong learning. Continual reinvestment in education is about the continued reinvestment in you. It benefits you, your staff, your business and ultimately Australian consumers. To be eligible to start the FChFP Program applicants must have achieved the required level of formal industry education and practical experience.



## Accelerate your learning

Start your FChFP journey by registering for one of the **Intensive Intake** days held in each capital city. Work with like-minded professionals and progress through the FChFP together.

The content of the FChFP is delivered through **online journal articles** which are written by leading financial practitioners. The articles provide relevant and practical insights into the leading thinking within the financial advice profession.

## Gain the AFA's highest professional designation

Complete the **knowledge-gap assessments** for each of the knowledge areas in the FChFP. The purpose is to establish what you already know, so you only reference the material that you will need to successfully complete the program.

To **attain the FChFP** you must complete four knowledge areas in total. Advisers have three months per knowledge area to complete this program. We will then assist you with your application for the FChFP designation to the Asia Pacific Financial Services Association.

## Our Education Partner

The AFA has partnered with the **Mentor Education Group**, the new face of RG146 Training Australia. Recognised both locally and internationally, Mentor Education has a track record of delivering leading and innovative business programs to the financial services profession.



**To take the first step along your FChFP journey**

Email [info@afa.asn.au](mailto:info@afa.asn.au)

Call 1800 656 009

[www.afa.asn.au](http://www.afa.asn.au)

