About the College

The College for Financial Planning is a regionally-accredited institution of higher education accredited by the Higher Learning Commission, a member of the North Central Association. The College is a wholly owned subsidiary of Apollo Education Group.

The College offers a Master of Science degree with a Personal Financial Planning major and two Master of Science in Finance degrees, nine proprietary professional designations, and the CFP Certification Professional Education Program. Founded in 1972, the College is the country’s most established provider of financial planning education and has over 150,000 graduates from its Master’s and non-degree programs.

- AAMS® | Accredited Asset Management Specialist™
- ADPA® | Accredited Domestic Partnership Advisor™
- APMA® | Accredited Portfolio Management Advisor™
- AWMA® | Accredited Wealth Management Advisor™
- CMFC® | Chartered Mutual Fund Counselor™
- CRPC® | Chartered Retirement Planning Counselor™
- CRPS® | Chartered Retirement Plans Specialist™
- MPAS™ | Master Planner Advanced Studies™
- FPQP™ | Financial Paraplanner Qualified Professional™

Are all trademarks owned by the College for Financial Planning and are awarded to individuals who successfully complete the College’s initial and ongoing designation requirements.
Why should you work with a CMFC® designee?

Decisions, Decisions
Over the years, mutual funds have become increasingly popular investment vehicles for meeting personal financial planning goals. Now the market is booming with diverse funds to serve all types of needs. And, after investments are made, how do you track their performance? Making crucial mutual fund investment decisions can seem like a monumental task.

We Know Mutual Funds
Turn to a professional on mutual funds for your investment advice—a Chartered Mutual Fund CounselorSM or CMFC® designee. CMFC® designees have ample knowledge of mutual funds and can effectively identify, analyze, and recommend those that are appropriate for your needs.

A CMFC® designee provides practical, hands-on information on how to use this popular and powerful investment vehicle to meet a broad range of your financial goals—from saving for your children’s college education to reducing taxes to building a nest egg for your retirement. With the wide variety of complex mutual fund information available today, and the overwhelming number of funds from which to choose, a CMFC® designee can give you knowledgeable advice on the best funds for your total financial picture.

Get Expert Advice

EDUCATIONAL PROGRAM | The College for Financial Planning provides CMFC® students with a thorough education focusing exclusively on mutual funds. Study materials are written and updated regularly by the College’s full-time faculty, who specialize in mutual funds and work closely with investment professionals to provide the most current information available.

CLIENT NEEDS ASSESSMENT | The CMFC® program emphasizes how to thoroughly evaluate mutual funds as well as how to use that information to make appropriate recommendations. This is what distinguishes this program from others in the industry.

CMFC® MARK | To be entitled to use this mark, candidates must successfully complete the specialized program and pass a rigorous examination, sign a code of professional ethics, and complete a disclosure form attesting to their professional conduct.

CONTINUING EDUCATION CREDIT
All CMFC® designees must sign a commitment to ongoing continuing education credit to ensure that they stay current in the field.

Disciplinary Process
The College investigates all complaints filed against a designee and its Ethical Conduct Committee determines whether the allegations are justified and if the conduct warrants disciplinary action. Complaints may be filed using the Complaint Submission form found on the College’s Financial Designation Resource site: www.cffpdesignations.com.

If a violation of the Standards of Professional Conduct is found, disciplinary sanctions shall be based on the seriousness of the situation and may include, but are not limited to, reprimand, suspension, or revocation.

Status Verification
An individual’s authorization to use one of the College’s designations can be verified online at: www.cffpdesignations.com or call 800-237-9990.

College for Financial Planning®
EDUCATING THE NATION’S TOP FINANCIAL ADVISORS™

THE COLLEGE’S STANDARDS OF PROFESSIONAL CONDUCT
The Standards of Professional Conduct establish minimum standards of acceptable professional conduct for persons authorized to use the College’s designations. Violations are subject to disciplinary procedures.

Integrity
Provide professional services with integrity, honor, fairness, and dignity and maintain client trust and confidence.

Objectivity
Maintain objectivity and impartiality with respect to services rendered and advice given.

Competency
Maintain an adequate level of knowledge and skill and effectively apply that knowledge while recognizing its limitations.

Confidentiality
Keep client information confidential, disclosing only when authorized or compelled by law.

Professionalism
Comply with all laws and regulations as required and applicable, refraining from actions that bring dishonor to you or your profession.