European Financial Planning Association

EFPA is the leading professional standards setting body for financial advisors and planners in Europe

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About EFPA

EFPA is the leading professional standards setting body for financial advisors and planners in Europe, building public confidence and trust.

EFPA influences the market behaviour of its certificate holders guiding these professionals in Knowledge, Skills, Lifelong learning, Behaviour and Ethics.

EFPA has a code of professional ethics with which certificate holders must comply.

EFPA Standards & Certifications

EFPA European Financial Planner™ (EQF 6)

Highest standard. Integrated practice of financial planning including investments at portfolio level, estate planning, international taxation, retirement and insurance needs not only for private clients but also for business owners. The educational programs should be covered in a minimum of 40 classroom days or 320 tuition hours (or equivalent).

EFPA European Financial Adviser™ (EQF 5)

Full (comprehensive) practice of financial advice. Refers to professionals who offer a rigorous service of assessing clients needs and developing financial solutions, particularly concerning investments at portfolio level, but also including basic insurance/ retirement /credit/financing solutions. The educational programs should be covered in a minimum of 20 classroom days or 160 tuition hours (or equivalent).

EFPA European Investment Practitioner™ (EQF 4)

Certification designed to meet the requirements set by art. 18 of the Esma Guidelines on knowledge and competences for staff giving investment advice. The training programs should be covered in a minimum of 10 classroom days or 80 tuition hours (or equivalent).

EFPA European Investment Assistant™ (EQF 3)

Certification designed to meet the requirements set by art. 17 of the Esma Guidelines on knowledge and competences for staff giving information about investment products, investment services or ancillary services. The training program should be covered in a minimum of 5 classroom days or 40 tuition hours (or equivalent).

European Financial Planning Association

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