

EQF Level 4 Certificate in Paraplanning & Financial Administration (CertPFA)

The Certificate in Paraplanning & Financial Administration (CertPFA) has been developed to meet the needs of individuals working, or aspiring to work, in financial administration or paraplanning roles, and provides comprehensive foundation knowledge of products, services, regulation and legislation in the financial advice industry. CertPFA consists of four mandatory units and is mapped to the occupational standards for paraplanning. It can act as a stepping stone to becoming a financial adviser.

CertPFA allows students to underpin learned knowledge by developing the skills required to support and maintain appropriate and ethical client relationships, and to meet clients' priorities by considering a range of protection, investment and retirement funding products. Those completing CertPFA will be able to demonstrate a commitment to career progression and evidence the necessary skills and knowledge to perform a variety of roles to a higher standard.

Some key points:

- CertPFA is equivalent to EQF/MQF Level 4
- CertPFA consists of four mandatory units
- Registration for CertPFA costs €490 and includes the learning manual, initial assessment entry and online access to updates during the study period
- Assessment for CertPFA is a 2-hour multiple-choice examination split into four 30 minute sections, focusing on one unit each. Students must achieve a minimum of 70% to pass each unit
- Students only resit units that they have not passed, allowing them to focus on areas of weakness rather than having to revisit the entire syllabus
- Upon successful completion of the CertPFA one may proceed to study the Diploma for Financial Advisers

Method of Application for Registration

Candidates who wish to apply and register for this programme need to fill in their details on the application form provided at the rear of this page and submit the application either by mail on ifs Malta, 60, G'Mangia Hill, Pieta PTA 1316 or by email on info@ifsmalta.org

Refund Policy: Full refund is provided prior to start of course. Less €50 administration fee. No money will be refunded once the course has started

Data Protection Notice: ifs Malta holds and processes your personal data in order to give you the full benefits of being a student, for administration purposes and to inform you of any future ifs Malta events, services and other related information. In instances where employers sponsor their employees for all or parts of the course/s, ifs Malta is bound to inform such employers upon the performance and results of their relevant employees if any assessment parts are carried out. ifs Malta does not sell or give your personal data to any other third party. In the eventuality that ifs Malta would need to give any personal data to a third party, you will on a case-by-case basis, be duly informed and you will also be given the opportunity to refuse that such data be given. You

have the right to request access to and rectification of, the personal data concerning you that is held by ifs Malta.

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Registration Form

CertPFA

Unit 1 Understanding the financial services industry

Unit 2 Understanding the financial services environment

Unit 3 Understanding financial services products

Unit 4 Working with clients in a financial planning environment

Unit 1 - Unit 4 (including learning material, initial assessment entry and online access to updates during the study period) [__] € 490

Resit [__] € 225

Personal Information

Name & Surname: _____ ifs Membership: _____

Date of Birth: ___/___/___ I.D. No.: _____ E-mail: _____

Home Address: _____

Telephone: _____ Mobile: _____

Office

Office Address: _____

Current Occupation: _____

Office Tel: _____ Office E-mail: _____

I hereby certify that the information given above is true and correct:

Signature

Date

Kindly write cheques payable to the Institute of Financial Services (Malta)

Cheque No.: _____ BOV / HSBC / APS / LOMBARD / BANIF / CBM Amount Paid in €: _____