

# Why you should choose a REGISTERED PARAPLANNER<sup>SM</sup> designee:

## Decisions, decisions.

Making crucial investment decisions can seem like an insurmountable task, especially as they relate to your broader financial picture, including insurance, tax, retirement, and estate planning, along with many other financial considerations. Managing a person's total financial situation encompasses a myriad of financial planning choices and strategies to serve a variety of needs and accomplish a variety of goals. With all of the complex financial planning information available today, a graduate of the REGISTERED PARAPLANNER<sup>SM</sup> Designation Program, working with a qualified financial planner, can give you knowledgeable advice to help you achieve your financial planning goals.

## We know how to manage your finances.

Turn to an authority in financial planning for your investment advice. REGISTERED PARAPLANNER<sup>SM</sup> designees have a thorough knowledge of several aspects of financial planning, and they can effectively identify, analyze, and recommend investments that are appropriate for your diverse needs.

Working in conjunction with a qualified financial planner, a Registered Paraplanner<sup>SM</sup> designee is a valuable member of your financial planning team. A REGISTERED PARAPLANNER<sup>SM</sup> designee has the training necessary to work on the basic elements of your financial picture, while the financial planner concentrates on your long-term goals. Together, this team will contribute to your overall financial success.

## Get advice from an expert.

- **Educational Program:** The College for Financial Planning<sup>®</sup> provides RP<sup>SM</sup> students with a broad education introducing them to different product categories, essential terminology, and general concepts applicable to financial planning. Study materials are maintained and updated regularly by the College's full-time faculty, who specialize in financial planning and provide the most current information available.
- **Client Needs Assessment:** The REGISTERED PARAPLANNER<sup>SM</sup> Designation Program emphasizes how to work closely with clients to create an overall financial picture. In addition, the program requires an internship period, to ensure that you aren't working with a novice.

- **Build Lasting Relationships:** A goal of REGISTERED PARAPLANNER<sup>SM</sup> Program graduates is to build lasting relationships with clients. Graduates learn to communicate effectively with clients to uncover hidden financial needs.

When you start looking for knowledgeable advice and thorough analysis on financial planning, look for a strong financial planning team that includes a REGISTERED PARAPLANNER<sup>SM</sup> designee from the College for Financial Planning.



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

The College for Financial Planning® is the country's oldest and most widely respected provider of financial planning education. Since 1972, the College has delivered the highest quality educational programs, courses, and materials to financial services professionals. Today, more than 81,000 graduates continue to excel in their professions and are consistently cited as some of the best advisors in the country.

## Know your financial planning team

A REGISTERED PARAPLANNER<sup>SM</sup> designee from the College for Financial Planning® is able to demonstrate competence in the following areas after completing the program:

- knowledge of the terms, facts, concepts, and theories in financial planning
- strong written and oral communication skills
- use of financial planning software
- ability to gather information and construct personal financial statements
- ability to review and analyze information provided by clients
- financial planning experience as a member of a financial planning team



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