

The Canadian Association of Financial Consultants



Information Brochure

About Us

The Canadian Association of Financial Consultants (CAFC) is an international professional organization chartered federally under Letters Patent granted by the Government of Canada. The Association has a world wide membership.

CAFC offers an educational program leading to the designation of Chartered Certified Financial Consultant (CCFC) issued to qualified graduates. The Institute is multidisciplinary, drawing its members from the related but separate fields of accountancy, insurance, law, funds management, tax and pensions. The Association is forging a "new" profession that adopts the best features from these

related professions and encourages the development of members' qualifications as financial consultants on the basis of their current professional qualifications.

Financial Consultants provide advice to clients in a wide variety of situations from the financial planner advising individual clients on investments, to those working as corporate financial officers, portfolio managers, security analysts and investment bankers in organizations as diverse as brokerage firms, mutual funds, banks, trust companies, corporate finance departments, insurance companies and other financial management firms.

Mission & Vision

The mission of CAFC is to provide education and certification for financial consultants so that members qualified to use the designation Chartered Certified Financial Consultant are recognized internationally as trusted financial advisors.

The vision of CAFC is to be the global leader in educating and certifying financial consultants.



Objectives

- to offer thorough and accessible educational programs for professionals anywhere in the world to qualify as competent financial consultants;
- to issue the designation of Chartered Certified Financial Consultant (CCFC) to qualified graduates of the educational program;
- to ensure each member adheres to the Association's code of ethics;
- to grow public respect for, and confidence in, the profession of financial consulting;
- to gather and circulate current information relevant to financial consulting to our Association members;
- to encourage and provide opportunity for Association members from all countries to share their knowledge and experience in financial consulting
- to promote and enhance professional and career opportunities for Association members throughout the world by maintaining the high standards of the Chartered Certified Financial Consultant designation.

Members

Applicants who successfully complete the Association's educational program and acquire three years of experience in financial management are granted the right to use the internationally respected designation CCFC (Chartered Certified Financial Consultant).

The Association issues a Certificate of Chartered Certified Financial Consultant to members who complete all the requirements. CAFC is committed to the highest professional competence and ethical standards for the financial consulting profession.



Advantages of Membership

- access to the educational program leading to the CCFC designation
- the privilege of using the internationally respected CCFC designation
- on going information on issues and trends in the field of financial consulting network- ing and informations haring with members from around the world through the Association's Web site
- support from the Association for the highest professional and ethical standards for the profession of financial consulting
- Members have a professional obligation to clients, employers, employees, the general public and other members to act competently and ethically at all times.
- Members are expected to comply with the content and the spirit of the Code of Ethics in order to fulfill this professional obligation. This obligation extends to employees and others who are supervised by the member.
- The Association's Board of Directors reserves the right to discipline members who do not comply with the Code, and may terminate membership and the privilege of using the CCFC designation for breaches of the Code.
- Applicants who successfully complete the Association's educational program and acquire three years of experience in financial management are granted the right to use the internationally respected designation CCFC (Chartered Certified Financial Consultant).
- The Association issues a Certificate of Chartered Certified Financial Consultant to members who complete all the requirements. CAFC is committed to the highest professional competence and ethical standards for the financial consulting profession.



The Canadian Association of Financial Consultants

Suite 420-1090 West Pender Street

Vancouver , V6E 2N7

CANADA

Email: info@thecafo.org

Fax: 604-687-1221

The Canadian Association of Financial Consultants is chartered federally by the Government of Canada