

## Moving online to reach the top of the Financial Planning profession

The Institute of Financial Planning (IFP) has chosen Nelson Croom, specialists in online learning, to develop online modules to prepare learners for their Certified Financial Planner (CFP) Certification. The CFP Certification is the globally recognized standard that Financial Planners aspire to obtain – putting them in the top 4% of financial services professionals in the UK, and joining 105,000 other CFP professionals worldwide.

Financial Planners currently work towards this internationally recognised certification by completing a 12-week home study plan or attending a CFP fast track residential course. This new project will expand and improve the current paper-based training manual to create a fully-interactive five module online learning solution.

“The CFP certification is the first step on the route to continuing competence. Bringing the course materials online will enable us to offer a structured programme of pre-course work that delegates on the fast track programme can do. The CFP certification is very much an assessment of competence – professionals must demonstrate that they can apply their technical skills to achieve their clients’ objectives and lifestyle goals,” explains Lucy Courtenay, Director of Education at the IFP.

*“Like many of the programmes we work on, the CFP Licence modules essentially deal with changing learners’ attitudes – we know that they are already highly-trained in the technical standards and we need to help them in their application of this knowledge. We have helped many professional associations provide online study solutions for their professional exams and qualifications, and this project will build on our expertise in this area”* commented Alan Nelson, Managing Director, Nelson Croom.

*“Bringing the course materials online offers an appropriate choice for busy practitioners to prepare for the CFP.”* Lucy Courtenay, Director of Education, IFP.

The online programme is currently in development and will be available to learners in March.

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### Notes for editors:

#### **About the Institute of Financial Planning**

The IFP is the UK professional body of those committed to the development of the multi-disciplinary profession of Financial Planning and represents and assists Financial Planning practitioners in the UK. The Institute’s mission is to build and maintain the profession of Financial Planning for the benefit of consumers in the UK. They offer a series of national events and training courses as well as a branch network across 21 areas of the UK.

#### **About Nelson Croom**

Nelson Croom creates and publishes online learning courses. We work in partnership with companies, professional associations and other organisations. We believe that learning works best when it engages and motivates people. Different people learn in different ways, with different levels of learning and knowledge. In a Nelson Croom programme the learner is always in charge of what they do and how they do it.

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