



PFP® Graduation Celebration

Congratulations Class of 2020-2021!



Canadian Securities Institute
A Moody's Analytics Company

NOVEMBER 30, 2021

Meet The Presenters



MARIE MULDOWNEY

Host/Moderator

Managing Director

CSI & Moody's Analytics



STUART GRAY

CFP®, CIWM, FCSI®

Guest Speaker

PFP® Council Chair

Director, Financial Planning
Centre of Expertise

RBC



CARISSA LUCREZIANO

CFP®

Guest Speaker

PFP® Council Vice-Chair

Vice President, Financial
and Investment Advice

CIBC

The PFP[®] Community

666

2020-2021 Graduates

5,719

Total PFP[®]s in Good Standing



2,671

Total Badge Acceptances

How to add your badge on your LinkedIn account

Step 1: Accept the Badge



[Additional Details](#)

Personal Financial Planner (PFP®)

Issued by [Canadian Securities Institute](#)

This digital credential indicates that the individual has completed the requirements to achieve the Personal Financial Planner (PFP®) designation. They possess the expertise and experience to develop robust financial plans tailored to each client's unique situation and providing them with financial advice. They are also adept at managing risk and developing and enhancing client relationships.

Skills



Earning Criteria

- [Completed 445-610 hours of study](#)
- [Successfully passed two 3-hour proctored credentialing examination](#)
- [Met 3-year Experiential Requirement](#)
- [Annual adherence to the Code of Ethics and Continuing Education Requirements](#)
- [Overall Designation Requirements](#)
- [Information in French](#)

Standards

[ISO 17024 Accreditation](#)

PFP® is 1 of only 3 financial services credentials to meet the highest certification standards in North America: ISO 17024 (granted by the American National Standards Institute in 2012). It acknowledges that CSI meets recognized global standards for certification bodies and PFP® letters meet rigorous requirements for competency and professionalism.

Step 2: Add the designation to your Licenses & Certifications section

Licenses & certifications



Personal Financial Planner (PFP®)

Canadian Securities Institute

Issued Nov 2021 · Expires Nov 2022

[See credential](#)

Designation Governance

- » Chair
- » Vice-Chair
- » Council:
 - Financial Institutions
 - Education Partners
 - Independent Financial Planners
- » Ethics Committee



PFP[®] Advisory Council Members

Marta Sadurska, CFP, PFP[®], FCSI[®]

Investment Specialist / Financial Planner
Servus Credit Union - Edmonton, AB

James G. Bilcox, CFP[®], FMA, PFP[®], CCS

Certified Financial Planner
Sunlife Financial - Calgary, AB

Joshua Wong, PFP[®]

Investment Sales Manager
HSBC Global Asset Management Ltd. - Vancouver BC

Stuart Gray (Chair), PFP[®], CFP[®], CIWM, FCSI[®]

Director, FP Support & Practice Management
RBC Royal Bank - Toronto ON

Carissa Lucreziano (Vice-Chair), PFP[®], CFP[®]

Vice President - Financial and Investment Advice
CIBC - Toronto, ON

Cristina Panaitescu-Rapan, PFP[®]

Senior Manager, Learning Programs
Scotiabank - Toronto, ON

Korinne Collins

Vice President - Education & Events
Canadian Credit Union Association - Toronto, ON

Maria Artuso, MBA, FCSI[®], QAFP

Community Manager
RBC Royal Bank - Milton, ON

Christine DiCarlo, MBA (Fin), CFP[®], CIM[®], FMA, FCSI[®]

Faculty (Business)
Mohawk College - Hamilton, ON



Importance of Financial Planning

Your role as a PFP[®] has never been more important in helping your clients have a plan!



Award of Excellence Recipients



MUNISH GARG

CIBC



YUNYAN LIAO

CIBC



ERNST BOXLER

CIBC

Supporting our Designation Community



RESOURCES



WEBINARS



GRADUATION



GIVING BACK

Congratulations!

View our 2020 – 2021 Graduating Class at csi.ca/pfp

For all questions, please email us at designations@csi.ca