

## About the College

The College for Financial Planning is a regionally-accredited institution of higher education accredited by the Higher Learning Commission, a member of the North Central Association. The College is a wholly owned subsidiary of Apollo Education Group.

The College offers a Master of Science degree with a Personal Financial Planning major and two Master of Science in Finance degrees, nine proprietary professional designations, and the CFP Certification Professional Education Program. Founded in 1972, the College is the country's most established provider of financial planning education and has over 150,000 graduates from its Master's and non-degree programs.

- AAMS® | Accredited Asset Management Specialist<sup>SM</sup>
- ADPA® | Accredited Domestic Partnership Advisor<sup>SM</sup>
- APMA® | Accredited Portfolio Management Advisor<sup>SM</sup>
- AWMA® | Accredited Wealth Management Advisor<sup>SM</sup>
- CMFC® | Chartered Mutual Fund Counselor<sup>SM</sup>
- CRPC® | Chartered Retirement Planning Counselor<sup>SM</sup>
- CRPS® | Chartered Retirement Plans Specialist<sup>SM</sup>
- MPAS<sup>SM</sup> | Master Planner Advanced Studies<sup>SM</sup>
- FPQP<sup>TM</sup> | Financial Paraplanner Qualified Professional<sup>TM</sup>

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**College for Financial Planning**<sup>®</sup>  
EDUCATING THE NATION'S TOP FINANCIAL ADVISORS<sup>SM</sup>

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## What You Need to Know About the **CRPS**<sup>®</sup> Designation



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# Why should you work with a CRPS® designee?



## An Easy-to-Manage Retirement Plan for Your Business

With all of the options available to today's plan sponsors, managing retirement plans for a business or small company can be a daunting prospect. Building a long-term retirement strategy that fits your employees' needs is a great goal—but how do you achieve it?

## We Make it a Reality

You need a strategic partner who can provide you with up-to-date information on your options and who can put things into perspective. Turn to a professional in retirement plans—a Chartered Retirement Plans Specialist<sup>SM</sup> or CRPS® designee. CRPS® designees can provide you with an understanding of how to establish an efficient retirement plan and ensure regular compliance with plan rules. A CRPS® designee can evaluate the financial status of your business and design the optimal plan for your employees.

## Get Expert Advice

Get the knowledgeable advice you need on issues such as qualified plans, the eligibility and deductibility of IRA contributions, profit sharing plans, stock bonus plans, 401(k) plans, distribution planning, and much more. A CRPS® designee can also help explain the details of establishing investment policy and objectives as well as the termination of a plan.

## What Sets Our Graduates Apart

**REAL WORLD EDUCATION** | The College for Financial Planning provides CRPS® students with a graduate-level curriculum that focuses exclusively on retirement planning. Study materials are written and updated regularly by the College's full-time faculty who specialize in retirement planning and provide the most current information available.

**CLIENT NEEDS ASSESSMENT** | The CRPS® program teaches students how to design, install, and administer retirement plans for the business community. This is what distinguishes this program from others in the industry.

**CRPS® MARK** | To be entitled to use this mark, candidates must successfully complete the specialized program and pass a rigorous examination, sign a code of professional ethics, and complete a disclosure form attesting to their professional conduct.

**CONTINUING EDUCATION CREDIT** | All CRPS® designees must sign a commitment to ongoing continuing education credit to ensure that they stay current in the field.

## Disciplinary Process

The College investigates all complaints filed against a designee and its Ethical Conduct Committee determines whether the allegations are justified and if the conduct warrants disciplinary action. Complaints may be filed using the Complaint Submission form found on the College's Financial Designation Resource site: [www.cffpdesignations.com](http://www.cffpdesignations.com).

If a violation of the Standards of Professional Conduct is found, disciplinary sanctions shall be based on the seriousness of the situation and may include, but are not limited to, reprimand, suspension, or revocation.

## Status Verification

An individual's authorization to use one of the College's designations can be verified online at: [www.cffpdesignations.com](http://www.cffpdesignations.com) or call 800-237-9990.



## THE COLLEGE'S STANDARDS OF PROFESSIONAL CONDUCT

*The Standards of Professional Conduct establish minimum standards of acceptable professional conduct for persons authorized to use the College's designations. Violations are subject to disciplinary procedures.*

### Integrity

*Provide professional services with integrity, honor, fairness, and dignity and maintain client trust and confidence.*

### Objectivity

*Maintain objectivity and impartiality with respect to services rendered and advice given.*

### Competency

*Maintain an adequate level of knowledge and skill and effectively apply that knowledge while recognizing its limitations.*

### Confidentiality

*Keep client information confidential, disclosing only when authorized or compelled by law.*

### Professionalism

*Comply with all laws and regulations as required and applicable, refraining from actions that bring dishonor to you or your profession.*