

Mapping of the Canadian Institute of Financial Planning’s CE Categories to CIRO MFD CE Credit Categories

This document provides guidance on how CE activities accredited by the Canadian Institute of Financial Planning on or after November 21, 2022 are to be used under the MFD CE Program.

Credits are to be assigned on a 1:1 basis. For example, a CE activity given 2.5 Compliance and Regulatory credits under the Canadian Institute of Financial Planning CE approval program would be worth 2.5 Business Conduct credits under the CIRO MFD CE Program.

Providers will have the ability to request that the Canadian Institute of Financial Planning undertake additional accreditation in order to provide a CE approval certificate/letter that shows details of the CIRO MFD CE credit categories.

- If Providers obtain this certificate with details of the CIRO MFD CE credit categories, they do not need to use the mapping below, but can instead rely upon the certificate provided by the Canadian Institute of Financial Planning.
- If Providers obtain a certificate without details of the CIRO MFD CE credit categories, they need to use the mapping below.

THE CANADIAN INSTITUTE OF FINANCIAL PLANNING CE CATEGORY	CIRO MFD CE CREDIT CATEGORY
Compliance and Regulatory	Business Conduct
Ethics and Professional Responsibility	Business Conduct – Ethics
Professional Development	Professional Development

All questions regarding the Canadian Institute of Financial Planning’s accreditation and the related CE program should be addressed to the Canadian Institute of Financial Planning.