

Mapping of FP Canada CE Categories to CIRO MFD CE Credit Categories

This document provides guidance on how CE activities accredited by FP Canada **on or after December 1, 2021** 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 Financial Planning credits under the FP Canada CE approval program would be worth 2.5 Professional Development Credits under the CIRO MFD CE Program.

Providers will have the ability to request that FP Canada 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 FP Canada.
- If Providers obtain a certificate without details of the CIRO MFD CE credit categories, they need to use the mapping below.

FP CANADA CE CATEGORY	CIRO MFD CE CREDIT CATEGORY
Financial Planning	Professional Development
Professional Responsibility	Business Conduct ¹
Practice Management	Professional Development
Product Knowledge	Professional Development
Giving Back	Cannot be recognized as CIRO MFD CE credits

1. If a Provider would like to post a CE activity as Business Conduct, they will need to provide confirmation from FP Canada whether it is “Business Conduct - Ethics” or “Business Conduct - Other”. Please note that, going forward, Providers can ask FP Canada to undertake accreditation of any activity (not just those that are Professional Responsibility) to determine if it qualifies as Business Conduct under the CIRO MFD CE program.

All questions regarding FP Canada’s accreditation and their CE program should be addressed to FP Canada.