



## The Swiss Financial Planners Organization

### Board Mission Statement

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The SFPO Swiss Financial Planners Organization is the

- credentialing,
- licensing,
- standards-setting and
- disciplinary

body whose mission is to benefit and protect the public by:

- a. setting the qualification for initial professional certification (benchmark setting for financial planning);
- b. protecting the CFP certification mark and the service marks CERTIFIED FINANCIAL PLANNER™ and CFP®;
- c. developing and administrating continuing post-certification requirements;
- d. developing and administrating disciplinary procedures for licensees;
- e. encouraging both certification attainment and certification retention of those persons licensed;
- f. enhancing the professionalism of those engaged in the exercise and pursuit of personal financial planning;
- g. information of the public about ongoing national and international financial planning issues;
- h. lobbying and active cooperation with governmental entities in the field of financial planning.

The Financial Planning in Switzerland covers the following seven broad subject areas:

1. fundamentals of financial planning;
2. insurance planning / risk management;
3. investment planning (including real estate);

4. tax planning (income, estate / gift, wealth, other);
5. retirement planning and employee benefits;
6. estate planning (including questions around the financial consequences of marriage and/or divorce) and;
7. comprehensive wealth management.

**The mission of the SFPO is to serve the professional needs of its members to facilitate their delivering quality financial planning advice to their clients.**

**To fulfill our mission, the SFPO is dedicated to:**

- 1. Promoting awareness and education of the public on the benefits of financial planning;**
- 2. Emphasis on the established and maintenance of high standards of education (this applies to initial and continuous upgrading as well as the promotion of high practicing standards);**
- 3. Provision of quality services to members to assist in their professional practice; and**
- 4. Representing the industry and ensure an operating environment which is conducive to providing quality financial planning advice.**