EFPA LUXEMBOURG
European Financial Planning Association

EFPA European Financial Planner®

Factsheet

Highest standard. Integrated practice of financial planning including investments at portfolio level, estate planning, international taxation, retirement and insurance needs not only for private clients but also for business owners.

Target audience:
Refers to professionals who offer a rigorous service of wealth planning.

Admission:
EFPA European Financial Advisor®, academic diploma or 5 years of professional experience.

Format:
Different format available following our training center partners:
- Distance-learning through video-conferences with expert. The learning platform contains also course materials and records of the video-conferences if needed.
- Classic learning, in class with experts.

Languages:
Course are provided in English. French under development.
Examination: English.

Beginning of classes:
1 session available per year (depending of the training center partners) starting in September.

Duration:
The educational program should be covered in a minimum of 20 classroom days or 160 tuition hours (or equivalent).

Objectives:
Acquire a perfect mastery of all the tools necessary for the exercise of the profession of wealth planner (see content below).

Content:

- Investment Products (level III): - Portfolio Construction (level III): - Insurance Products (level III): - Retirement advice (Level III): - Real Estate Investing (Level II):	48 hours
- Estate Planning:	24 hours
- Financial Planning:	32 hours
- Tax implication:	24 hours
- Financial planning process	32 hours

Final examination:
Format: 2 written exams (multiple choice questionnaire and practical cases).
Available date: February and July

Certification:
Certified **EFPA European Financial Planner®**.
Certification recognized by the CSSF and other regulators across Europe.

Cost:
Courses: 2'000€.
Final Examination: 650€.

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