



Introduction to the Society of Financial Planners Ireland

The Society of Financial Planners Ireland (SFPI) is the professional and representative body for qualified Certified Financial Planning Professionals (CFP®).

The SFPI exists to promote and enhance the understanding of Financial Planning as a profession and to represent the views of our members with regulatory, governmental, statutory and consumer bodies.

Who are the members of the SFPI?

Membership of the Society of Financial Planners Ireland comprises some of the most experienced and senior financial planners in the country, as well as recent CFP® graduates. Our members come from the legal, tax, accountancy, banking, pension and financial planning sectors in Ireland.

What we do?

We work tirelessly to promote financial planning as a profession and in doing so our aim is to raise the profile of CFP® professionals, for the benefit of all.

We run high quality training events on topical issues for our members. These events cover subjects such as pending legislation, compliance, financial planning, retirement, estate and tax planning. As well as any issues that may affect clients' management of their personal financial affairs.

We support continuous professional development of CFP® professionals, and provide our members with access to training from the cutting edge of global financial planning.

Benefits of membership - why join the SFPI?

If you are a qualified CFP®, you will access the following membership benefits.

- Member of the professional and representative body of Ireland's leading financial planners,
- Networking opportunities with like-minded professionals,
- Access to regular, relevant, high quality training,
- Access to continuous profession development events,
- Access to cutting edge global financial planning initiatives,
- A directory listing on the SFPI website.

The SFPI is a not for profit organisation, run entirely by volunteers, all qualified CFP® professionals. We are independent, having no affiliation or support from any particular organisation.

How do I join the SFPI?

If you are a qualified CFP® all you need to do is go to our website www.sfpi.ie and follow a few simple instructions.

Once on the home page, click on the 'How to become a member' section. This will bring you to the application form which you will need to complete. Your completed application will then be considered for approval by the Board. If you are a CFP® professional you will be applying for full membership. Non-CFP® colleagues may apply for Associate Membership.

Annual membership is now open and costs just €250. Membership includes access to all CPD and other events in the year.

The Society of Financial Planners Ireland

Company Limited by Guarantee

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