



Who are the Society of Financial Planners of Ireland?

The Society of Financial Planners of Ireland is the voice of, and community for, Financial Planning Professionals in Ireland. Our mission is “To enhance the understanding of financial planning as a profession and to represent the views of our members with Regulatory, Governmental, Statutory and Consumer bodies.”

Members.

Our members come from a wide variety of backgrounds, including those in private practice and those working for larger organisations such as insurance companies and banks and includes some of the most experienced financial planners in the country, as well as more recent CFP® graduates. All of our members have attained the CFP® designation, which is the most recognised and prestigious global financial planning designation, so are well versed in what it means to be a financial planning professional. The SFPI is a not for profit organisation, run entirely by a volunteer Board of Directors, elected by the members. We are a completely independent body, having no affiliation or support from any particular organisation.

History

Originally established in 2011 by a group of like-minded individuals who were passionate about financial planning and about fostering greater collaboration and knowledge sharing amongst financial planners, the SFPI recognises the importance of ensuring that a strong community of financial planning professionals is established in Ireland. Where the Financial Planning Standards Board (FPSB) develops standards for, governs and certifies financial planning professionals in Ireland, at the SFPI we seek to represent our members and ensure their voice is heard, while at the same time building a collaborative community of Financial planning professionals.

Benefits of membership

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

- Membership of the only representative body solely for Ireland’s financial planning community,
- Access to regular networking and collaboration events with like-minded financial planning professionals, where members share thoughts and insights on a variety of subject matters of relevance to our profession,

- Access to regular, member only, high quality technical seminars and webinars, delivered by independent speakers on key topics relevant to our profession, as well as more practical areas such as practice management, IT, Communication, Wellbeing etc,
- A listing on the “Locate a Financial Planner” section of the SFPI website,
- Relationship-building opportunities with successful peers that can yield solutions to problems, provide accountability, and establish lifelong friendships and collaborations,

How do I join the SFPI?

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

Annual membership is now open and costs just €250, and includes access to all SFPI events throughout the year. This includes the technical events, which will fully satisfy your ongoing CPD requirements for the CFP® designation, as well as the less technical networking and collaborative events.

FREE Student membership

For those currently undertaking the Graduate Diploma and on the pathway to the CFP® designation, we are delighted to offer FREE student membership for the duration of their studies. Simply go to our website, www.sfpi.ie, and select student membership.

If you would like to hear more about the SFPI and how you can join us in building a financial planning community in Ireland, please pop an email to info@sfpi.ie and we will arrange an introductory call for you with one of our current Board members.

Thank you.