

EFPA “GREATStrategy“



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PREAMBLE

- **EFPA is the leading professional standards setting body for financial advisors and planners in Europe, building public confidence and trust.**
- **EFPA influences the market behaviour of its certificate holders guiding these professionals in Knowledge, Skills, Lifelong learning, Behaviour and Ethics.**
- **EFPA has a code of professional ethics with which certificate holders must comply.**

GOVERNANCE

- EFPA has a federal structure based on equality (one country one vote) with collective accountability.
- EFPA periodically reviews its governance, strategic plan and its implementation.
- EFPA has a solid framework with a clear focus on improving the affiliates' and associates' governance by engaging key stakeholders.

RECOGNITION

- EFPA strives for effective engagement with consumers, European and national regulators, policy makers and financial companies/institutions.
- EFPA through improving financial advice and planning is building greater consumer trust and confidence in the financial services sector.
- EFPA actively helps strengthen customers' financial education.

ENLARGEMENT

- EFPA by establishing its high standards, recognized across Europe and internationally, endeavours to increase the numbers and quality of certificate holders, promoting professionalism, sharing good practice, and local experience and offering services.

- EFPA has a clearly defined and flexible structure supporting further development of the existing affiliates/associates and enabling expansion into new countries.
- EFPA has its primary focus on Europe. It has a clear plan and strategy to acquire new members and launch mutual recognition agreements with other organisations.

AWARENESS

- EFPA is building a greater consumer awareness of the values of EFPA certification standards as well as the benefits of being advised by an EFPA certified professional.
- EFPA actively promotes its professional standards and certificates to secure and justify public confidence, enhance trust and build reputational profile.

TRANSPARENCY

- EFPA promotes transparency of information.
- EFPA is open to share its professional standards based on learning outcomes in line with the EQF structure.
- EFPA and its national affiliates and associates run publicly accessible registers showing certified professionals.
- EFPA oversees and makes public the effective implementation of the ethical code at national level.
- EFPA supports all regulation and market practices aimed at increasing the transparency of financial services and products.
- EFPA expects the highest level of transparency among its certificate holders in their professional practice.

STANDARDS/CERTIFICATION

- EFPA maintains and develops well defined professional and ethical standards for financial advice and planning in Europe with the highest quality content.
- EFPA through its national organisations encourages the consistency of its standards across Europe, which are also supported by CPD requirements and shared activities at European level.
- EFPA partners with other organizations in Europe and worldwide to enlarge mutual recognition, adding value and mobility to our certificate holders.

