

臺灣理財顧問認證協會 CFP[®] Professional 人數成長名列全球前三名

2020 年 2 月 27 日

FPSB 總會 (Financial Planning Standard Board)在 2 月 25 日透過官網公布全球 CFP[®]認證計畫之持證人總數：全球 CFP[®] Professional(CFP[®]專業人士) 人數上升至 188,104 位。FPSB 和各會員國在去年提升了 3.7%的 CFP[®]持證人總數，增加了 6,744 位 CFP[®] Professional，過去五年下來的平均成長率則是落在 3.6%。臺灣理財顧問認證協會(FPAT)下 CFP[®] Professional(專業人士)成長比率更排名全球第三。

FPSB 首席執行官 Noel Maye 表示：“FPSB 很高興看到一般金融顧問和理財規劃人員對追求 CFP[®]認證 (全球理財規劃專業卓越的象徵) 的興趣逐漸增加。”

在臺灣，擁有的理財規劃能力及財富管理的專業人才不勝枚舉，許多民眾及客戶開始審慎思考自己如何將儲蓄已久的資產及個人的理財規劃託付給值得信賴的人。臺灣理財顧問認證協會(FPAT) 透過 FPSB 所制定的全球理財專業標準要求每一位 CFP[®] Professional 成員嚴格遵守道德規範及職業準則，從客觀和專業的角度將客戶的利益放在首位。臺灣近幾年各主要金融機構陸續和協會合作，致力將 CFP[®]證照推廣至各金融背景之從業人員，宣導其價值及擁有的專業態度將有助於提升民眾對全球金融理財服務的信心和信任。

有關 2019 年全球 CFP[®] Professional 成長的更多詳細資訊，請瀏覽 FPSB 的資訊(附件圖)。

新聞聯絡人：

社團法人臺灣理財顧問認證協會秘書長傅清源 電話：(02) 33653551



FINANCIAL PLANNING STANDARDS BOARD

2019 GROWTH

IN CERTIFIED FINANCIAL PLANNER PROFESSIONALS

188,104*



**CFP Professionals
in 26 Territories Worldwide**

*2019 year-end figures



7 FPSB AFFILIATE ORGANIZATIONS ADDED >200 CFP PROFESSIONALS



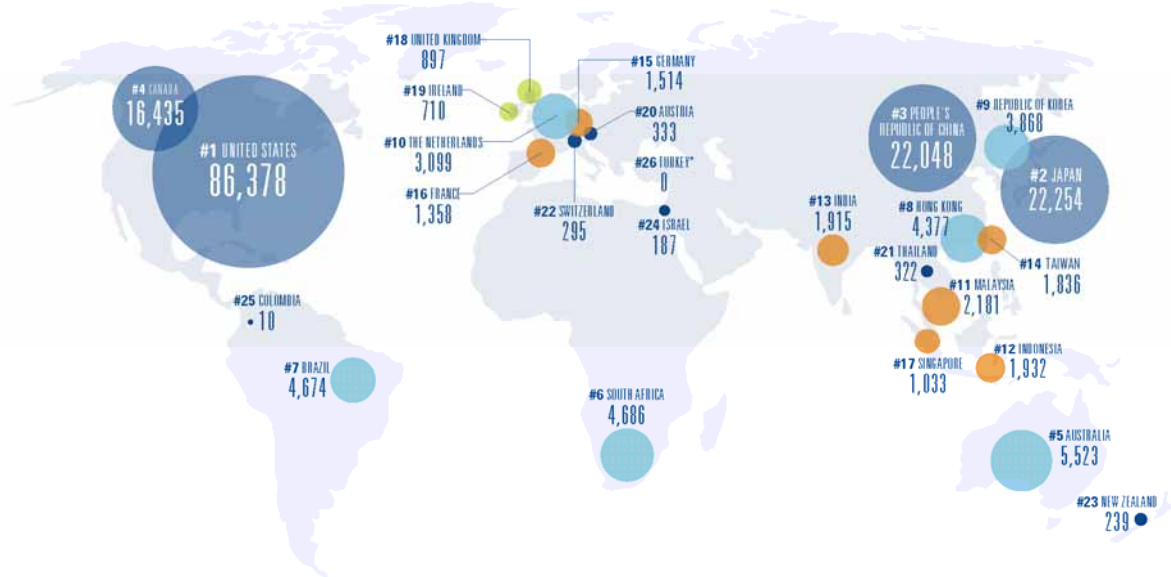
CFP Professionals by Region



- AMERICAS (57%)
- ASIA (36%)
- EUROPE (4%)
- AFRICA (2%)
- MIDDLE EAST (1%)

CFP Professionals by Territory


*Preparing to offer CFP certification



FPSB VISION

To establish financial planning as a global profession and the CFP marks as the global symbol of excellence in financial planning.

FPSB MISSION

To benefit the global community by establishing, upholding, and promoting worldwide professional standards in financial planning. FPSB's commitment to excellence is represented by the marks of professional distinction – CFP, CERTIFIED FINANCIAL PLANNER and .



FPSB is pleased to see continued strong interest among financial advisors and financial planners in pursuing CFP certification, the global symbol of excellence in financial planning. Having a large and growing community of CFP professionals worldwide committed to providing advice and services in an ethical and professional manner will support FPSB's mission to benefit the public, and help restore public confidence and trust in financial services globally."

NOEL MAYE, FPSB CEO

Financial Planning Standards Board Ltd. owns the CFP marks outside the U.S. and permits qualified individuals to use these marks to indicate they have met FPSB's initial and ongoing certification requirements.



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