

新舊版專業教育訓練課程綱要差異比較

FPAT 新教育訓練課程(合計240小時)	時數	FPAT 舊教育訓練課程(合計240小時)	時數
NM1 基礎理財規劃 (含理財規劃心理學) Financial Planning Principles, Process and Skills	20	M1 基礎理財規劃 Foundations of Financial Planning	40
NM2 財務管理 Financial Management	20		
NM3 風險管理與保險規劃 Risk Management and Insurance Planning	32	M2 風險管理與保險規劃 Risk Management and Insurance Planning	40
NM4 投資規劃與資產配置 Investment Planning and Asset Management	32	M4 投資規劃 Investment Planning	40
NM5 退休規劃 Retirement Planning	32	M3 員工福利與退休金規劃 Employee Benefits and Retirement Planning	40
NM6 稅務規劃 Tax Planning	32	M5 租稅與財產移轉規劃 Tax and Estate Planning	40
NM7 財富傳承規劃 Estate Planning and Wealth Transfer	32		
NM8 綜合理財規劃(含理財規劃書制定) Integrated Financial Planning	40	M6 全方位理財規劃 Comprehensive Financial Planning	40