



PECB Certified ISO 22222 Lead Personal Finance Manager

Master the principles of Personal Financial Planning (PFP) based on ISO 22222

Why should you attend?

ISO 22222 Lead Personal Finance Manager training enables you to acquire the expertise to support clients in successfully achieving their financial goals. During this training course, you will also gain comprehensive knowledge of the best practices and ethical principles of Personal Financial Planning (PFP) and be able to effectively use them to manage a client's personal finances by adopting the PFP process based on ISO 22222.

After mastering all the necessary concepts of Personal Financial Planning, you can sit for the exam and apply for a "PECB Certified ISO 22222 Lead Personal Finance Manager" credential. By holding a PECB Certificate, you will be able to demonstrate that you have the specialized experience and skills to effectively manage a Personal Financial Planning process.

Course agenda

DURATION: 5 DAYS

- Day 1: Introduction to ISO 22222 and Personal Financial Planning (PFP)
- Day 2: Gather and analyze phases of the Personal Financial Planning (PFP) process
- Day 3: Develop, implement and monitor phases of the Personal Financial Planning (PFP) process
- Day 4: Ethics, competence, experience and conformity to ISO 22222
- Day 5: Certification Exam

General information

- Certification fees are included on the exam price
- Training material containing over 450 pages of information and practical examples will be distributed
- A participation certificate of 31 CPD (Continuing Professional Development) credits will be issued
- In case of exam failure, you can retake the exam within 12 months for free