



## 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.



## Who should attend?

- Managers or financial planners seeking to master their skills in providing distinguished financial services
- Financial planners seeking to support clients in planning and managing their finances
- Financial advisors responsible for Personal Financial Planning (PFP)
- Expert advisors involved in financial planning processes

## Course agenda

Duration: 5 days

### Day 1 | Introduction to ISO 22222 and Personal Financial Planning (PFP)

- Course objectives and structure
- Standards and regulatory frameworks
- Basic concepts in personal financial planning
- Understanding personal financial planning
- Personal financial planning process approach
- Establish and define the client and personal financial planner relationship
- Determine the current financial situation

### Day 2 | Gather and analyze phases of the Personal Financial Planning (PFP) process

- Gather client's data
- Gather information about client's goals and expectations
- Analyze and evaluate the client's situation and intentions
- Risk assessment process
- Financial risk tolerance

### Day 3 | On-site audit activities

- Develop and present the financial plan
- Develop and present recommendations for client's financial status
- Implement the financial plan
- Monitor changes

### Day 4 | Ethics, competence, experience and conformity to ISO 22222

- Ethics
- Competence
- Experience and claiming conformity
- Scottish credit and qualification framework level description
- Competence, evaluation and closing the training

### Day 5 | Certification Exam



## Learning objectives

- Master the ethical principles of ISO 22222, the benefits they entail and learn how to use them in managing a client's finances
- Master the ISO 22222 process and learn how to incorporate it in financial services
- Learn how to interpret the ISO 22222 requirements in the specific context of Personal Financial Planning
- Develop the expertise to provide personal financial planning services to clients
- Learn how to effectively implement, manage and monitor Personal Financial Planning processes

## Examination

Duration: 3 hours

The "PECB Certified ISO 22222 Lead Personal Finance Manager" exam fully meets the requirements of the PECB Examination and Certification Programme (ECP). The exam covers the following competency domains:

- Domain 1** | Personal Financial Planning fundamentals
- Domain 2** | Establishing and defining the client and PFP relationship
- Domain 3** | Gathering client data and determining goals and expectations
- Domain 4** | Analyzing and evaluating the client's financial status
- Domain 5** | Developing and presenting the financial plan
- Domain 6** | Implementing recommendations and monitoring the financial plan
- Domain 7** | Ethics, competency, experience and claiming conformity

For more information about exam details, please visit [Examination Rules and Policies](#).





## Certification

After successfully completing the exam, you can apply for the credentials shown on the table below. You will receive a certificate once you comply with all the requirements related to the selected credential.

For more information about ISO 22222 certifications and the PECB certification process, please refer to the [Certification Rules and Policies](#).

Credential	Exam	Professional experience	PFP experience	Other requirements
<b>PECB Certified ISO 22222 Provisional Personal Finance Manager</b>	PECB Certified ISO 22222 Lead Personal Finance Manager exam or equivalent	None	None	Signing the PECB Code of Ethics
<b>PECB Certified ISO 22222 Personal Finance Manager</b>	PECB Certified ISO 22222 Lead Personal Finance Manager exam or equivalent	<b>Two years:</b> One year of work experience in Personal Financial Planning	Personal Financial Planning activities: a total of 200 hours	Signing the PECB Code of Ethics
<b>PECB Certified ISO 22222 Lead Personal Finance Manager</b>	PECB Certified ISO 22222 Lead Personal Finance Manager exam or equivalent	<b>Five years:</b> Two years of work experience in Personal Financial Planning	Personal Financial Planning activities: a total of 300 hours	Signing the PECB Code of Ethics

## 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