

Mapping of FP Canada Accreditation to MFDA CE Categories

This document provides guidance on how CE activities accredited by FP Canada **on or after December 1, 2021** are to be used under the MFDA CE Program.

Credits are to be assigned on a 1:1 basis. For example, a CE activity given 2.5 Financial Planning credits under the FP Canada CE approval program would be worth 2.5 Professional Development Credits under the MFDA CE Program.

Providers will have the ability to request that FP Canada undertake additional accreditation in order to provide a CE approval certificate/letter that shows details of the MFDA Categories.

- If Providers obtain this certificate with details of the MFDA categories, they do not need to use the mapping below, but can instead rely upon the certificate provided by FP Canada.
- If Providers obtain a certificate without details of the MFDA categories, they need to use the mapping below.

FP CANADA CE CATEGORY	MFDA CE CATEGORY
Financial Planning	Professional Development
Professional Responsibility	Business Conduct ¹
Practice Management	Professional Development
Product Knowledge	Professional Development
Giving Back	Cannot be recognized as MFDA CE credits

1. If a Provider would like to post a CE activity as Business Conduct, they will need to provide confirmation from FP Canada whether it is “Business Conduct - Ethics” or “Business Conduct - Other”. Please note that, going forward, Providers can ask FP Canada to undertake accreditation of any activity (not just those that are Professional Responsibility) to determine if it qualifies as Business Conduct under the MFDA CE program.

All questions regarding FP Canada’s accreditation and their CE program should be addressed to FP Canada first.