

MASTER PLANNER ADVANCED STUDIESSM (MPAS[®])

Individuals who have earned the Master Planner Advanced StudiesSM (MPAS[®]) designation from the College for Financial Planning[®] have completed advanced education in financial planning and may use the MPAS[®] mark. The MPAS[®] designation is voluntary. No federal or state law or regulation requires financial planners to hold the MPAS[®] designation.

MPAS[®] designees have demonstrated advanced knowledge in comprehensive financial planning, including the ability to integrate complex strategies across retirement, tax, estate, and wealth management disciplines. To earn the MPAS[®] designation, an individual must fulfill the following requirements:

- **Education** – Complete the Master Planner Advanced Studies program through the College for Financial Planning[®]. The program consists of graduate-level coursework designed to expand knowledge in advanced financial planning topics and emphasize real-world application of planning strategies. Candidates must also hold a qualifying professional designation such as CFP[®], ChFC[®], CLU[®], or another approved credential.
- **Examination** – Successfully pass examinations associated with each required course. The examinations are designed to assess an individual's ability to apply advanced financial planning concepts in practical and complex client situations.
- **Experience** – Meet eligibility requirements established by the College for Financial Planning[®], which may include prior professional experience in financial planning or a related field.
- **Ethics** – Agree to be bound by the College for Financial Planning[®] Code of Ethics and Professional Responsibility, which establishes ethical and professional standards for MPAS[®] designees.

Individuals who earn the MPAS[®] designation must complete the following ongoing education and ethics requirements to maintain the designation and continue use of the MPAS[®] mark:

- **Ethics** – Commit to complying with the College for Financial Planning[®] Code of Ethics and Professional Responsibility. Failure to adhere to these standards may result in disciplinary action.
- **Continuing Education** – Complete continuing education requirements as established by the College for Financial Planning[®] to maintain competence and remain current with developments in advanced financial planning.