



PlanPlus Inc.

FOR IMMEDIATE RELEASE

Caribbean Financial Planning Association Chooses PlanPlus

Port of Spain, Trinidad, June 17, 2009 – **The Caribbean Financial Planning Association** has signed a memorandum of understanding with **PlanPlus Inc.**, the Canadian financial planning software company, to provide software and training programs for financial services policy makers, educators, students and career professionals in the CARICOM countries.

The Caribbean Financial Planning Association (CFPA) is a relatively new, non-profit education and career development association based in Trinidad & Tobago with chapters in Jamaica and Barbados. The CFPA provides access to training and certification for financial professionals in the Caribbean banking, insurance and investment sectors. They promote the discipline and practice of personal and corporate financial planning for client-facing staff in these three sectors.

“Our mission is to raise the bar in the Caribbean for professionals and students in the banking, investment and insurance service sectors”, said Jon Golding, President of the CFPA. *“Traditionally people get their designations abroad in the UK, US or Canada since localized training is difficult with our dispersed populations. PlanPlus is unique in providing software and training online so geography is not a problem. Better still, it is now being customised for local jurisdictional usage”.*

The CFPA faces challenges because of the makeup of the region. The Caribbean Community and Common Market (CARICOM) consists of 15 member countries and 5 associate members with a total population about 7,000,000. Each member country might have different currencies and tax regimes, but business is often done by members on several different islands. Language can also be a challenge with the use of English, Spanish and Dutch.

“Canada has had close ties to the Caribbean educationally and in business over the past 100 years”, said Shawn Brayman, President of PlanPlus. *“Working with the CFPA allows us to take advantage of their familiarity and knowledge with the rules, regulations, laws and customs of the CARICOM members and their associates. They can really capitalize on the language, jurisdiction and currency capabilities of our financial planning software.”*

“PlanPlus for Students” will be available through the CFPA to anyone interested in the subject as a first step in financial services. The more sophisticated **“PlanPlus Web Advisor”** will be available to career professionals in the banking, investment and insurance sectors.

About the Caribbean Financial Planning Association

The CFPA is a non-profit, education and career development association based in Trinidad with chapters in Jamaica and Barbados. The CFPA provides access to training and certification for financial professionals in the Caribbean banking, insurance and investment sectors. They promote the discipline and practice of personal and corporate financial planning for client-facing staff in these three sectors. *The CFPA mission is to assist the career development of financial professionals in empowering families and business owners in the Caribbean towards financial self-sufficiency.*

Website: <http://caribfpa.com>

About PlanPlus Inc.

PlanPlus Inc. provides advice centric wealth management and financial planning software solutions to financial services firms worldwide. PlanPlus has become a world-recognized firm with its ground-breaking software PlanPlus Web Advisor and industry-leading training and service offerings. PlanPlus has users in North and South America, the Caribbean, Asia and Europe. PlanPlus Inc is a Canadian company established in 1990. It is privately owned and located in Lindsay, Ontario.

Website: <http://www.planplus.com>

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