



PlanPlus Inc.



FOR IMMEDIATE RELEASE

## **CIFPs Signs Agreement with PlanPlus**

**Toronto, Ontario, May 5 2010** - Keith Costello, President and CEO of CIFPs announced today that they have signed a Memorandum of Understanding with PlanPlus Inc. to provide professional financial planning tools for CFP candidates in Canada.

“Over the past few years there has been an accelerated move towards the definition of a true profession of Financial Planning,” said Costello, “Higher educational standards, practice standards and an increasing focus on research - not simply financial products - are all evidence of this trend.”

“PlanPlus has demonstrated a unique commitment to the profession through their student offerings, professional planning tools and the creation of Planipedia.org. As the principal association dedicated to CFP<sup>®</sup> Licensees in Canada, the CIFPs felt PlanPlus was a natural partner to help us add value for students and our Members.”

The CIFPs is a leading provider of education programs to help individuals prepare for the CFP<sup>®</sup> exam. One application of *PlanPlus for Students* is to provide a common framework for student assessment in the new Capstone course. Instructors can use the software to oversee students as they create the comprehensive financial plan required to demonstrate professional competence.

A second area of collaboration between the CIFPS and PlanPlus is the planning Wiki [www.Planipedia.org](http://www.Planipedia.org). PlanPlus has developed and contributed over 120 pages of student exercises that are published in Planipedia.

“Planipedia is the not-for-profit, community-based Wiki dedicated to professional financial planning”, said Shawn Brayman, President of PlanPlus. “Since it was launched in October, the CIFPs and over 20 other organizations have become ‘Supporters’. This group includes organizations from a dozen countries and content has been contributed in several languages. The CIFPs has taken the initiative to share content that helps not only their membership but also financial planners around the world.”

“We have been impressed with the PlanPlus commitment to objective research for the profession”, said Costello. “Not only have they won research awards, but Shawn Brayman is a frequent speaker at many events - including our annual Members conference. Shawn brings an important perspective on the benefits of planning research for our members.”

“We recognize that there are a number of great financial planning tools available in Canada that are crucial for professional Financial Planners to deliver quality advice to their clients. As part of our Affinity program for CIFPs members, PlanPlus is also offering CIFPs members the professional version of PlanPlus *Plan/it* at a special discount” added Costello.

### **About the Canadian Institute of Financial Planners (CIFPs)**

The CIFPs is a non-profit association of Canadian CFP<sup>®</sup> licensees. The association is an independent, effective, and powerful, CFP-focused advocate for the CFP<sup>®</sup> certification marks and the financial planning profession in Canada. Membership is open to all Canadian CFP<sup>®</sup> Licensees, Associates who have completed their pre-license educational requirements and Students who are currently enrolled in a qualified CFP<sup>®</sup> educational program, and concerned investors.

Website: [www.cifps.ca](http://www.cifps.ca)

**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 groundbreaking software PlanPlus Plan*it* 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: [www.planplus.com](http://www.planplus.com)

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