

JAFP Third Mid-Term Business Plan Summary

1. Promote Personal Financial Planning and Personal Finance Education

JAFP will promote personal financial planning and increase the consumers' financial literacy by personal finance education. For this purpose, JAFP will strengthen the relationship with the public sectors and financial education entities.

(1) Promote personal finance education

Promote personal finance education for students up to the college level

Create and utilize personal finance education material for adults

Provide new tools to assess consumers' financial literacy on JAFP's website

(2) Advertise JAFP's non-profit activities to benefit the public

(3) Start the Third-grade Certified Skilled Worker of Financial Planning examination to broaden the financial planning grassroots

(4) Hold "FP Day" annually

(5) Strengthen the relationship with the public sectors and financial education entities

2. Enhance the CFP® and AFP brands and qualities (Establish the social status of JAFP's certification programs)

JAFP will increase the awareness of CFP® certification being a globally recognized credential based on the concept of 4Es and 6-step process, and AFP certification being an eminent credential as well, and will enhance the qualities of those certifications at the same time. By doing so, we will establish the social status of CFP® and AFP certificants who play the important roles in personal finance education.

(1) Strengthen the branding activities

(2) Broaden the opportunities for CFP® and AFP certificants to play the roles in JAFP's non-profit activities to benefit the public

(3) Increase ethics and compliance education contents and opportunities

(4) Advertise the superiority of JAFP's certification programs (ethics and continuing educations) to the industry and society

(5) Strengthen the skills of CFP® and AFP certificants by providing useful information relating the practice of financial planning, etc.

< Mission Statement >

Japan Association for Financial Planners (JAFP) promotes the value of financial planning to the public as a non-profit organization, fosters and certifies financial planners whose roles are to provide efficient and sound personal financial planning for consumers according to the changes in the environment. JAFP supports consumers' financial management by regulating the ethical conduct of its certificants, which will benefit the Japanese society.

< Aim of JAFP Third Mid-Term Business Plan >

By implementing the following activities, JAFP will benefit the Japanese society.

JAFP will promote personal financial planning through schools and public educational activities, and increase the consumers' financial literacy by personal finance education.

JAFP will increase the public awareness that CFP® and AFP certificants possess high ethical standards and competency through continuing education, and are the best suited to promote personal finance education, and easily accessible to consumers through nationwide activities. At the same time, JAFP will continue striving to improve the CFP® and AFP certificants' professional competency.

As a result, recognition of the importance of personal financial planning and the consumers' financial literacy will increase. In the meantime, the consumers' trust in financial planners will advance, thus the satisfaction of JAFP members will be improved by establishing the social status of CFP® and AFP certifications and the social needs for financial planning.

3. Establish Personal Finance as Academics

Through strengthened relationship with Japan Academic Society for Financial Planning (JASFP) and higher education institutions, JAFP aims to establish personal finance as academics.

(1) Strengthen relationship with JASFP and higher education institutions

(2) Accomplish financial planning-related research and effective advertisement

4. Strengthen International Activities

Through the activities in Financial Planning Standards Board Ltd. (FPSB), JAFP will promote financial planning globally, increase the international status of CFP® certification, and establish JAFP's position in the global community.

(1) Increase and maintain the quality and brand of CFP® certification through international activities

(2) Establish JAFP's position in the global community by strengthening the relationship with FPSB and financial planning organizations in Asia

5. Strengthen the Foundations of the Organization

JAFP will fulfill membership services and strive to improve the satisfaction of its members, and strengthen the foundations of the organization by assuming social responsibility as a prominent non-profit organization in Japan.

(1) Strengthen the organization and manage with an outlook to the future

(2) Fulfill membership services

(3) Support nationwide Blocks and Chapters

(4) Promote member registrations and certification renewals

(5) Strengthen financial standing for sustainable business development