

## **RFA**

### **Minimum Requirements for Registered Financial Associate**

You must have earned a baccalaureate or graduate degree in financial planning with strong emphasis on subjects relating to economics, accounting, business, statistics, finance and similar studies. This institution must offer an IARFC approved or CFP equivalent college curriculum and be an accredited college or university.

When the RFA completes the four years of experience and provides evidence of having met license requirements for securities and life and health insurance or submits RIA affiliation information, the RFA designation will then be automatically converted to RFC.

The applicant must have a sound record of business integrity with no suspensions or revocations of any professional licenses.

All members must agree to devote a minimum of 40 hours per year of continuing professional education in the field of personal finance and professional practice management, commencing the first full year after graduation.

The RFA designation continues up to four years, while the designee completes continuing education requirements. Thereafter, it converts to the Registered Financial Consultant (RFC) designation.