



CARIBBEAN FINANCIAL PLANNING ASSOCIATION



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***“Self-Sufficiency for Our People
Through Goal-Directed Financial Planning
Enabled by Our Financial Professionals”***

PRESS RELEASE

"Caribbean Financial Planning Association Signs MOU with the Chartered Institute for Securities and Investment."

The Caribbean is the latest market to benefit from CISI qualifications. Under a new agreement, the Caribbean Financial Planning Association (CFPA) will promote the CISI qualifications to those working in the banking, insurance and investment sectors of the financial services industry in the region.

The Trinidad and Tobago-based CFPA is a non-profit educational and career development organisation which serves the finance sector in the 15 Caribbean Community (CARICOM) member countries. It will endorse the suitability of qualifications, including the CISI's "International Introduction to Investment", "International Certificate in Wealth Management", "Islamic Finance Qualification", "Risk in Financial Services" and other short courses of interest from their large inventory.

The CFPA will also assist the CISI in securing relationships with training providers for the promotion of the Institute's "Diploma and Wealth Management" programmes to students on higher level finance and MBA programmes.

Simon Culhane FCSI, Chief Executive of the CISI, said: *"We are delighted to sign this Memorandum of Understanding as the Caribbean is an important market and working with the CFPA is an example of the Institute's collaborative approach to help improve skills within the industry worldwide. The CISI's vocational qualifications allow students to attain globally-portable exams tailored for local markets."*

Jon Golding FCSI, President of the CFPA, said: *"This is an historic event, bringing professional investment education and training to the Caribbean from Britain's top professional body in this sector, the CISI."*

Caribbean banks, trust companies, credit unions, stockbrokers, asset managers, broker-dealers, advisors and even regulators will all benefit from this new open door to investment knowledge and qualifications from London, the world's international financial centre.

The new and dynamic Trinidad & Tobago International Financial Centre (TTIFC) will need a constant supply of qualified professionals to fulfil its purpose. Locals

with CISI qualifications and professional memberships will have their careers well grounded by joining the CFPA for early access to these benefits

More importantly, the CFPA reaches out to the ultimate consumer of financial products and services, through our membership mission and values to help them become financially self-sufficient and less dependent on investment advisors. The better qualified we can coach our members to be in investments the more they can educate the consumer. Our new and valued CISI relationship gives us the means to fulfil our mission.”

For further information visit www.caribfpa.com

29th November 2009

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