



## 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 Chooses PlanPlus"**

The Caribbean Financial Planning Association (CFPA) has signed a memorandum of understanding with PlanPlus Inc., the leading Canadian financial planning software company, to provide software and training for financial services policy makers, educators, students and career professionals in the CARICOM countries.

The CFPA is a relatively new, non-profit educational and career development association based in Trinidad & Tobago with chapters so far in Jamaica and Barbados. They provide access to training and certification for financial professionals in the banking, insurance and investment sectors. They promote the discipline and practice of personal and corporate financial planning - for research, analytical and client-facing staff employed in the region.

The CFPA claims to be different from other financial planning associations around the world. Its culture is one of uncompromising focus on the ultimate consumer, through the empowerment of its members, with state-of-the-art financial planning skills and tools. This holistic skill set can then be integrated with the service offerings of their employers to better fit the needs of the consumer; private, corporate or institutional. This is in contrast to other similar bodies which exist primarily to serve their members' needs for career development and professional recognition.

Jon Golding, President of the CFPA said:

***“Our mission is ‘Self-Sufficiency for Our People, Through Goal-Directed Financial Planning, Enabled by Our Financial Professionals’.***

*“The CFPA is attracting members who wish to be a millenium ahead of traditional practice in the financial professions. That is, to connect usefully right into the needs and lives of their clients. With the help of PlanPlus, the CFPA will bring advanced methods of goal-directed financial planning, to both families and SME owners, enabling them to become self-sufficient as never before”.*

*“Traditionally our people seek their professional accreditations abroad in the UK, US or Canada - since localised 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”.*

Shawn Brayman, President of PlanPlus said:

*“Canada has had close ties to the Caribbean educationally and in business over the past 100 years. 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 in the region interested in the subject as a first step in financial services. The more sophisticated **“PlanPlus Web Advisor”** will also be available through the CFPA to career professionals in the banking, investment, insurance, accountancy and legal services sectors.

For more information visit the CFPA website [www.caribfpa.com](http://www.caribfpa.com)

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