



Distinguishing Characteristics of the International RFC Designation



The mission of the IARFC echoes the principles of a founder of the financial planning movement, Loren Dunton. While this noble calling is shared by many of the associations of financial advisors, the IARFC perspective dictates that **more** is required. More than selling products, more than providing asset management, or assisting with security transactions. The RFC® is dedicated to providing financial planning techniques, services by meeting the high standards of education, experience and integrity that are required by the International Association of Registered Financial Consultants and are truly committed to ethical standards and continuous professional education.

To support the RFCs that strive to accomplish these lofty aims, here are some of the IARFC's distinguishing characteristics:

1. Continuing Education. In a world society of rapid economic, tax and regulatory change and development, a career of continuous study is a necessity. The IARFC requires that each RFC complete 40 units of CE each year – which is more than other designations (typically 15 hours). This education stimulates continued professional development since over 80 topics of marketing, management, technology, service and product implementation are included. There are twelve methods whereby the RFC can complete this study and record keeping requirements are not complex.

2. Ongoing Professional Development. The greatest education comes from successful practitioners: At periodically scheduled meetings we assemble technical experts, have case study presentations by local experienced financial advisors and offer sharing sessions featuring area practitioners. These serve to increase the effectiveness of the RFC in the marketing and delivery of client services.

Financial Advisors Forum gathers the leading advisors and experts in financial services to provide an intimate idea exchange and networking. This is a three-day event, with full workbook, visual aids, hospitality events and educational exhibitors.

Cruise Conferences are an outstanding venue to acquire more CE and personally interface with leading advisors on an intimate basis during the week-long events held aboard a luxury cruise liner.

Plan Competition. IARFC sponsors a Financial Plan Competition and presents awards for the submission of the finest comprehensive plans – to advance the profession and recognize quality plans.

3. Publications. For U.S. members we produce the monthly IARFC **Register** magazine (28-36 pages) with current events, practice management and marketing articles. The **Register** is distributed electronically to our worldwide membership.

Quarterly we produce the 150 page **Journal of Personal Finance** which includes academic research and technical analysis articles. Monthly in Asia we distribute the **Advisers Magazine** in Mandarin and a quarterly **Register** in both Mandarin and simplified Chinese.

4. Credibility Tools. The IARFC provides three consumer focused brochures and materials, stationery and card designs, letter and agenda copy and professional recognition jewelry.

The use of a professional logo and certificate enhances the image of the RFC and helps the client feel comfortable in the relationship.

5. Professional Verification. The qualifications of the RFC advisor may be verified at the RFC website: www.IARFC.org which also contains consumer-oriented information and articles. Eventually all the local RFC websites of various nations will be linked for advisor lookup and file exchange.

6. Certification. Every RFC receives a very handsome 16 x 20 inch Certificate for framing, as well as a smaller notebook display version and a very discrete recognition RFC gold key lapel pin.

7. International Recognition. IARFC presents the Loren Dunton Memorial Award to those persons who have made significant and noteworthy contributions to the profession.

13. International Support. IARFC staff coordinates the activity and growth within each region, interchanging operation and training materials

14. International Standards Organization. The association actively participates in the development of accepted standards of practice and the professional interchange of ideas.