

WHY YOU SHOULD CHOOSE AN ADPASM DESIGNEE:



The nation's *only* professional designation specifically geared toward domestic partner relationships, from the College for Financial Planning.

Advice that meets your specific needs

Learn about your options by turning to a professional educated to work with lesbian, gay, bisexual, and transgender (LGBT) individuals, as well as heterosexual couples who have chosen not to marry.

An Accredited Domestic Partner AdvisorSM or ADPASM designee has studied factors and situations that cause financial planning for domestic partners to be different from financial planning for legally married spouses, including wealth transfer, taxation, retirement planning, and estate planning issues; as well as alternative planning solutions for these situations.

Get advice from an expert.

An ADPASM designee can evaluate your financial status and design the optimal financial plan for your lifestyle and unique need. Get the knowledgeable advice you need on issues such as wealth transfers, federal taxation, retirement planning, and end-of-life needs for domestic partners.

- **Educational Program:** The College for Financial Planning[®] provides ADPASM students with a thorough education focusing exclusively on planning for the needs of domestic partnerships. Study materials are written and updated regularly by the College's full-time faculty, who specialize in financial planning, and provide the most current information on the subject.
- **Client Needs Assessment:** The ADPASM program teaches students how to assess a client's situation and needs—and then evaluate financial options and make appropriate recommendations.
- **ADPASM Mark:** To be entitled to use this mark, candidates must successfully complete the specialized program and:
 - ◆ Pass a rigorous examination
 - ◆ Abide by standards of professional conduct
 - ◆ Comply with self-disclosure requirements regarding their professional conduct
 - ◆ Complete sixteen (16) continuing education credits (hours) per designation within the two-year authorization period.

Prior Expertise

In addition to being an expert in issues facing domestic partners, advisors holding the ADPASM must also hold one or more of the following:

- The **CERTIFIED FINANCIAL PLANNER[™]** or CFP[®] certification
- The **Accredited Asset Management SpecialistSM** or AAMS[®] designation
- The **Chartered Retirement Planning CounselorSM** or CRPC[®] designation

This ensures that every ADPASM has a well-rounded and comprehensive financial education.





**College for
Financial Planning**[®]
EDUCATING THE NATION'S TOP FINANCIAL ADVISORSSM

The College for Financial Planning[®] is the country's oldest and most widely respected provider of financial planning education. Since 1972, the College has delivered the highest quality educational programs, courses, and materials to financial services professionals. Today, more than 120,000 graduates continue to excel in their professions and are consistently cited as some of the best advisors in the country.



Code of Ethics

The Code of Ethics requires compliance with the following three components:

- 1) adherence to the Standards of Professional Conduct;
- 2) self-disclosure of prior allegations or violations; and
- 3) adherence to the Terms and Conditions.

Standards of Professional Conduct

Individuals credentialed by the College for Financial Planning are required to adhere to the following five tenets of professional conduct. These tenets embody the ethical and professional ideals that are fundamental to the College's professional designations.

1. Integrity

Provide professional services with integrity, honor, fairness, and dignity and maintain client trust and confidence.

2. Objectivity

Maintain objectivity and impartiality with respect to services rendered and advice given.

3. Competency

Maintain an adequate level of knowledge and skill and effectively apply that knowledge while recognizing its limitations.

4. Confidentiality

Keep client information confidential, disclosing only when authorized or compelled by law.

5. Professionalism

Comply with all laws and regulations as required and applicable, refraining from actions that bring dishonor to you or your profession.



Is your financial planner an expert
in the unique needs
facing domestic partners?

Let us make sure they are.

