

Chartered Life Practitioner (ChLP)



Take the **lead** in Risk

Start your professional pathway to becoming a Chartered Life Practitioner (ChLP).

The AFA has a fundamental belief in lifelong learning. Continual reinvestment in professional development education is about investing in you and your business. It benefits you, your staff, your business, and ultimately Australian consumers. To be eligible to start the ChLP you must have achieved the required level of formal industry education and practical experience.



Key points at a glance

Getting started	<p>Self-directed learning: Enrol at any time. All material is delivered online so you can enjoy the flexibility of accessing your content and business projects tools when it suits you.</p> <p>Peer-group learning: Enrol with like-minded professionals and join a collaborative peer-group intake.</p>
Entry Requirements	DFP or equivalent plus practical experience requirements.
How long does it take?	Three months per unit. Maximum timeframe for completion is 2 years from enrolment date.
What are the assessments?	<p>Practical business projects: Implement four business projects that are relevant & practical to you.</p> <p>Online articles & insights: Complete online assessments based on articles and insights written by leading industry practitioners.</p>
Are there exemptions?	Exemptions may be granted based on previous academic qualifications and professional accreditation. Previous qualifications must be at a post-graduate level.
Completion	Formal certification as a Chartered Life Practitioner is recognised by the Asia Pacific Financial Services Association (APFinSA).

Our Education Partner: Kaplan Professional

The AFA has proudly partnered with Kaplan as our principal education partner. The alignment with Kaplan builds upon the significant reach and capability the AFA has in delivering education solutions that are built around the needs of the modern financial adviser and most importantly their clients.

To take the first step along your ChLP journey

Email info@afa.asn.au
 Call 1800 656 009
www.afa.asn.au



Campus AFA's Chartered Life Practitioner (ChLP) is a professional designation for specialist risk advisers - turning academic study into practical business outcomes.

The Chartered Life Practitioner (ChLP) designation is for risk advisers who want to gain formal recognition as a specialist and to demonstrate to their clients their commitment to education and the profession.

The Chartered Life Practitioner designation is awarded through the Asia Pacific Financial Services Association (APFinSA) and is recognised by all 10 member countries. The Asia Pacific region is Australia's most important neighbour, both geographically and economically, and the AFA is a founding country member.

Campus AFA learning experience

➤ Formal learning experience

The ChLP curriculum is based on post-graduate level content and thinking. It is like a mini-MBA for risk specialists.

The learning framework gives you the know-how to understand, analyse and adapt to the drivers of change that are shaping the future for financial advisers. And that is the essence of the curriculum of the AFA's Chartered Designation – it gives you the tools to adapt and thrive.

➤ Practical learning experience

The ChLP curriculum is based on adult-learning principles which mean the content and business projects are relevant and practical to both salaried and self-employed advisers. The ChLP turns academic study into practical business applications through designing, building and implementing four business projects that are crafted by you – for you.

➤ Peer-group learning experience

Complete your ChLP designation with like-minded professionals in a collaborative peer-to-peer learning environment of Campus AFA. Leverage the collective experience and expertise of the group.

“The AFA's ChLP designation turns academic study into practical business applications”



The ChLP designation provides you with a comprehensive and innovative business framework – helping you to take the lead in the risk profession.

ChLP Curriculum	Business Project	Business Outcome
<div data-bbox="113 573 411 824"> <p>AFA 1 Business Strategy for Financial Advisers</p> </div> <div data-bbox="459 566 973 633"> <p>Craft your strategy for a profitable & sustainable advice business</p> </div> <div data-bbox="459 640 973 864"> <p>Diagnose the strategic health of your business and apply a strategic planning framework to craft your business strategy. A lot of advisers have a business plan but few review, update and implement it. Does your business plan react to change or anticipate it?</p> </div>	<p>Strategic Plan</p>	<p>Develop a strategic plan to achieve your business vision</p>
<div data-bbox="113 965 411 1216"> <p>AFA 2 Client Experience Strategy</p> </div> <div data-bbox="459 958 903 1025"> <p>Maintain & attract more of your ideal clients</p> </div> <div data-bbox="459 1032 979 1290"> <p>Consumer research gives us a blueprint for building capability in critical areas which are highly valued by clients. Craft your client engagement strategy by researching your target market and enhancing your communication skills and emotional intelligence to deliver a truly exceptional client experience.</p> </div>	<p>Client Experience Strategy</p>	<p>Maintain and attract your ideal clients</p>
<div data-bbox="113 1391 411 1641"> <p>AFA 3 Advanced Risk Solutions</p> </div> <div data-bbox="459 1391 932 1458"> <p>Align your advice solutions to the outcomes your clients want</p> </div> <div data-bbox="459 1464 991 1659"> <p>Enhance your technical expertise and capability through a complex advice strategy paper. Solve your clients' problems through the construction of advice solutions that improve the wellbeing and financial situation of your client segment.</p> </div>	<p>Risk Strategy Paper</p>	<p>Align your advice solutions to what your clients want</p>
<div data-bbox="113 1749 411 2000"> <p>AFA 4 Professional Conduct & Governance for Financial Advisers</p> </div> <div data-bbox="459 1742 999 1843"> <p>Good corporate governance influences behaviours and promotes consumer confidence in the advice profession</p> </div> <div data-bbox="459 1850 963 2107"> <p>Professional advice businesses have at their core great culture, behaviours and professional standards. Implement risk management strategies and build a culture that positively influences organisational behaviours, and aligns your ideas for business growth with professional best practice.</p> </div>	<p>Governance Plan</p>	<p>Set the foundations for a sustainable and profitable advice business</p>