Private Sector Specialists

Private sector expert	Certif.	Professional association	Website
Accounting & Tax Adviser	CA	Chartered Professional Accountants Association of Canada	www.cpacanada.ca
Accounting & Tax Adviser	CGA	Chartered Professional Accountants Association of Canada	www.cpacanada.ca
Accounting & Tax Adviser	CPA	Chartered Professional Accountants Association of Canada	www.cpacanada.ca
Accounting & Tax Adviser	ACAF	Chartered Professional Accountants Association of Canada	www.cpacanada.ca
Accounting & Tax Adviser	CMA	Society of Management Accountants of Canada	www.cpacanada.ca
Accounting & Tax Adviser	LPA	Chartered Professional Accountants Association of Canada	www.cpacanada.ca
Credit Counsellor	AFCC	Credit Counselling Canada	https://creditcounsellingcanada.ca/
Estate Planner	TEP	Society of Trust & Estate Practitioners Canada	https://step.ca/
Estate Planner	MTI	Canadian Securities Institute	www.csi.ca
Estate Planner	CETS	Canadian Securities Institute	www.csi.ca
Financial Advisor	DFSA	Canadian Securities Institute	www.csi.ca/en#
Financial Advisor	CFA	Chartered Financial Analyst Institute	www.cfainstitute.org/
Financial Counselor	AFC	Association for Financial Counseling & Planning Education	www.afcpe.org/
Financial Counselor	CFC	Canadian Association for Financial Empowerment	www.cafe-acaf.org/
Financial Planner	CFP	Financial Planning Standards Council	www.cfp.net/about-cfp-board
Financial Planner	CFP	Chartered Institute of Financial Planning	www.cifp.ca

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Financial Planner	PFP	Canadian Securities Institute	www.csi.ca/en#
Financial Planner	RFP	The Institute of Advanced Financial Planners	www.iafp.ca/planners/
Immigration Consultant	RCIC	College of Immigration & Citizenship Consultants	https://college-ic.ca
Investment Advisor/Broker	CIM	Canadian Securities Institute	www.csi.ca/en#
Investment Advisor/Broker	FCSi	Canadian Securities Institute	www.csi.ca/en/credentials/fcsi
Investment Advisor/Broker	CSC	Canadian Securities Institute	www.csi.ca/en/credentials/fcsi
Lawyer	JD	Law Society of each province	N/A
Lawyer specializing in estate planning & trusts	CSETL	Law Society of Ontario	https://lso.ca/directory-of-certified-specialists/estates-&-trusts-law
Lawyer specializing in estate planning & trusts	LLM	Law Society of each province	N/A
Life Insurance Agent	CLU	Financial Advisors Association of Canada	www.advocis.ca/advocis-education/
Life Insurance Agent	RLIS	Chartered Institute of Financial Planning	www.CIFP.ca
Life Insurance Agent	LLQP	Provincial insurance regulators	N/A
Real Estate Broker/Agent/Salesperson	FRI	Real Estate Institute of Canada	www.reic.ca/designations.html
Real Estate Broker/Agent/Salesperson	CRES	Real Estate Institute of Canada	www.reic.ca/designations.html

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Residential Leasing Specialist	CLO	Real Estate Institute of Canada	www.reic.ca/designations.html
Residential Mortgage Specialist	AMP	Mortgage Professionals Canada	https://mortgageproscan.ca/
Residential Mortgage Specialist	AMPC	Mortgage Professionals Canada	https://mortgageproscan.ca/
Residential Mortgage Specialist	PMPC	Mortgage Professionals Canada	
Residential Mortgage Specialist	CRU	Real Estate Institute of Canada	www.reic.ca/designations.html
Residential Property Manager	ARM	Real Estate Institute of Canada	www.reic.ca/designations.html
Residential Property Manager	CAM	Real Estate Institute of Canada	www.reic.ca/designations.html
Residential Property Manager	CPM	Real Estate Institute of Canada	www.reic.ca/designations.html
Residential Property Manager	ARM	Real Estate Institute of Canada	www.reic.ca/designations.html
RESP Dealer - Sales Person	DRPC	RESP Dealers Association	www.respdac.com/
Wealth Manager	CIWM	Canadian Securities Institute	https://www.csi.ca/