



Financial Psychology Institute® Application

NOTE: PLEASE INCLUDE A CURRICULUM VITAE/RESUME

Which FPI program/s interest you (check all that apply):

- Certified Financial Behavior Specialist® (FBS®)
- Monthly Applications Group
- Other _____

Full Name: _____

Name as you like it to appear on any Certificates or the FPI website:

Company: _____ Position: _____

Primary Profession: financial advising mental health

 Other: _____

Date of Birth: _____

EDUCATIONAL HISTORY (attach additional pages as needed):

Degree: _____ Year Awarded: _____

Field of Study: _____ Institution: _____



Degree: _____ Year Awarded: _____

Field of Study: _____ Institution: _____

Professional Certifications/Licenses: _____

Mailing Address: _____

City, State, & Zip Code: _____

Work Phone: _____ Mobile/Home Phone: _____

E-mail Address: _____

How did you hear about us? _____

Please describe your professional goals as they relate to financial psychology (attach additional pages as needed):



Certified Financial Behavior Specialist® (FBS®)

1. Please see [Financial Psychology Institute®](#) for requirements.
2. If you have met the requirements for certification*, please send the following:
 - a. Curriculum vitae/resume, highlighting your formal studies in financial planning, financial psychology, behavioral finance, mental health, etc.
 - b. Copy of college/university transcripts.
 - c. Detailed descriptions of other financial psychology-related professional trainings completed, including copies of certificates of completion, contact hours, name of trainers, sites, topics, etc.
 - d. A listing of your applicable professional memberships, activities, and publications.
 - e. Details of related professional work experience (if not described in your curriculum vitae/resume).
 - f. Two letters of recommendation from professionals familiar with financial psychology or financial therapy, and who are also familiar with your work.
 - g. \$250 fee once accepted, which will maintain your certification for two years.
3. Send your materials to: Brenda@financialpsychologyinstitute.com.

*Based on a review of your application materials, the FPI may take one of the following actions:

a) award the certification, or b) develop an individualized action plan to help the applicant meet the requirements of certification.