

**Interdisciplinary Training  
Financial Specialist Group (FSG)  
Admissions and Practice Qualifications  
2009**

**Admission to the Interdisciplinary Financial Specialist Group and the requirements to participate as a Financial Specialist in the Collaborative process:**

- 1. The Financial Specialist Group is made up of four separate specialists:**
  - a. Financial Advisor:**
    - 1) Credentialed PFS, CFP or ChFC, and**
    - 2) Completion of the CDFA (Certified Divorce Financial Analyst) within 12 months of membership or JD**
  - b. Valuation Specialist:**
    - 1) Credentialed ABV, CVA, ASA or CBA, and**
    - 2) Completion and certification of a CMPS (Certified Mortgage Planning Specialist) designation within 12 months of membership**
  - c. Financing Specialist: maintain a Licensed Mortgage Broker/Mortgage Banker (non-bank lender) - State of Ohio or an employee of a Federally Chartered Bank (this does not require State of Ohio licensing)**
  - d. Tax and Accounting Specialist: credentialed CPA**

**All specialists must be a member in good standing within their respective organization and can only practice within the above specialization if appropriately credentialed and maintain reasonable and customary professional liability insurance.**

- 2. Must be a member in good standing with the CPFA and IACP**
- 3. Completion of Basic Collaborative Training and Interdisciplinary Training (must have at least one training completed at time of admission to the group and the other completed within 12 months.**
- 4. Member FSGs will meet as needed throughout the year. Member FSGs must attend 50% of the combined FSG and Collaborative Practice Group meetings (all exceptions must be approved by the FSG group).**