Kingdom Advisors

Reveal. Respond. Realize.

Qualified Kingdom Advisors Requirements

A Qualified Kingdom Advisor is a disciple of Christ who is equipped and motivated to disciple others in financial stewardship.

Area of Qualification	Initial Qualification Requirements	Ongoing Annual Qualification Requirements
I. Statement of Faith	**A. Personal Requirements** **1.** Signed Statement of Faith **2.** Personal testimony of conversion to Christ	**A. Personal Requirements** **1.** Review and re-sign Statement of Faith
II. Ethics and Integrity	**A. Personal Requirements** **1.** Signed Code of Ethics **2.** Letters of Reference **a.** Letter of reference from pastor or member of pastoral staff including signed statement of church involvement. **b.** Two (2) client references	**A. Personal Requirements** **1.** Review and re-sign Code of Ethics
III. Personal Practice of Financial Biblical Stewardship	**A. Personal Requirements** **1.** Practice of Biblical stewardship in personal life **a.** Signed statement on Personal Practice of Financial Biblical Stewardship including: Regular giving in proportion to income to local church and/or other Christian ministries. Maintenance of a controlled lifestyle, minimize use of personal debt and practice a family budget and good cash management skills. Exhibiting integrity in completing personal tax returns. **b.** Written Definition of Stewardship	**A. Personal Requirements** **1.** Ongoing practice of Biblical stewardship in personal life **a.** Signed statement on Personal Practice of Financial Biblical Stewardship including: Regular giving in proportion to income to local church and/or other Christian ministries. Maintenance of a controlled lifestyle, minimize use of personal debt and practice a family budget and good cash management skills. Exhibiting integrity in completing personal tax returns.

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IV. Application of Biblical Wisdom in Counsel	**A. Educational Requirements** **1.** Complete the Kingdom Advisors Core Training and understand the body of knowledge in the core competency areas.	**A. Educational Requirements** **1.** Be engaged with Kingdom Advisors continuing education opportunities.
	B. Leadership Requirements **1.** Current and active member of Kingdom Advisors in good standing. **a.** Be an active member of a local Kingdom Advisors branch. **b.** Promote Kingdom Advisors and be willing to assist and/or mentor fellow members.	**B. Leadership Requirements** **1.** Current and active member of Kingdom Advisors in good standing. **a.** Be an active member of a local Kingdom Advisors community. **b.** Promote Kingdom Advisors and be willing to assist and/or mentor fellow members. **c.** Provide assistance to all revenue and non-revenue generating inquiries received from Kingdom Advisors. Assist either personally or via outside referral.
	C. Core Beliefs **1.** Review the list of core beliefs and indicate agreement with Kingdom Advisors' Core Beliefs in each area or attach personal belief.	**C. Core Beliefs** **1.** Review the list of core beliefs and indicate agreement with Kingdom Advisors' Core Beliefs in each area or attach personal belief.
V. Technical Competence	**A. Professional Requirements** **1.** Professional Designation(s)* **2.** Professional License(s)* **3.** Fulfill professional continuing education requirements.* **4.** Professional Experience (must have one of the following) **a.** Must have a current professional designation, or **b.** Must have been full-time for a minimum of ten (10) years in the specific professional discipline applied for without a professional designation. This does not apply for accountants and lawyers. Accountants and lawyers must meet the professional designation requirement. * See Professional Qualifications by Discipline	**A. Professional Requirements** **1.** Confirm there are no compliance or licensing issues since the prior year.

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Discipline/Qualifications As Defined By Kingdom Advisors

Financial Planner
Qualifying Designations: CFP®, ChFC, CPA/PFS
(If you do not hold one of the above designations and would like to be listed as a Financial Planner in the Qualified Kingdom Advisors Listing, Kingdom Advisors will need to clarify that the type of planning you are involved in with your clients meets our definition of financial planning. Please review the description listed below and the information in the website link given. If you believe that you meet these qualifications, please submit to us a copy of a comprehensive financial plan that you have produced for one of your clients when you turn in this packet. You can remove the clients' names, Social Security Number, etc when you submit the plan.)
A Financial Planner seeks to help people use God-given resources to accomplish God-given goals by:

1) Identifying the goals God has put in their heart to accomplish and then quantify how much is necessary to accomplish them.
2) Motivating people to proactively take the steps necessary to reach and more desirable future by making better use of existing resources an increasing cash flow margin.
3) Helping people to stay on track and maintain their progress toward their pre-determined goals, resulting in peace of mind.

These goals are accomplished in part by implementing a comprehensive financial plan that includes the six step process as outlined by the Certified Financial Planning Board of Standards, Inc. (for details see www.kingdomadvisors.org/type_planner.html)

Accountant
Qualifying Designations: CPA, EA
An Accountant/Tax Professional is either a Certified Public Accountant who has been licensed by the respective agency responsible for professional licensing in their state or an Enrolled Agent who has demonstrated technical competence in the field of taxation and is licensed by the federal government.

Investment Professional
Qualifying Designations: CFP®, ChFC, CPA/PFS, CFA, CIMA, AAMS
(10 or more years of experience in field accepted)
An investment professional provides professional expertise to the management of investment assets held in retirement accounts, trusts, individual and joint accounts.

Insurance Professional
Qualifying Designation: CLU
(10 or more years experience in field accepted)
An insurance consultant helps people find adequate amounts of insurance coverage at competitive prices.

Lawyer
Qualifying Designation: JD
An attorney is a person who has passed the bar exam in their state and is licensed to practice law in that state. Those attorneys who are most involved with Kingdom Advisors tend to be proficient in the area of gift and estate planning, business succession planning, income tax planning, business law, family partnerships, and corporate reorganizations.

Mortgage Professional
Qualifying Designation: CMPS
10 or more years experience in field required

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	Professional Discipline	Type of Practice	Required Designation
1.	**Financial Planner** (College of FP)	Comprehensive Planning	CFP®, ChFC, CPA/PFS
2.	**Accountant**	Personal Income Tax, Corporate Income Tax	CPA, EA
3.	**Investment Advisor** (Registered with SEC or State and flat fee paid for advice; or Registered with Broker Dealer and paid on commission)	Investment Management	CFP®, ChFC, CPA/PFS, CFA, CIMA, AAMS
4.	**Insurance** (Captive vs. Career vs. Independent)	List Lines of Insurance	CLU
5.	**Lawyer** (Estate Planning Process)	Estate, Wills, Trusts, Planned Giving, etc.	State Bar
6.	**Mortgage Professional**	Mortgage / Lending	CMPS