

**1. TITLE OF THE CERTIFICATE (HU)**

54 343 04 0010 54 04 Személyes pénzügyi tervezési referens

**2. TRANSLATED TITLE OF THE CERTIFICATE (EN)**Personal financial planning referent  
(THIS TRANSLATION HAS NO LEGAL STATUS)**3. PROFILE OF SKILLS AND COMPETENCES****A typical holder of the certificate is able to:**

- Provide support in the financial decisions of the client with his or her financial knowledge, and knowledge related to the financial environment and the system of income distribution processes.
- Collect financial information, keep databases, provide date
- Organise and analyse data, information and relations necessary for economical decisions
- Provide recommendation on the content of a portfolio, perform personal financial planning
- Based on the assignment given by the investor, managed investment instruments in the interest of the investor

**4. RANGE OF OCCUPATIONS ACCESSIBLE TO THE HOLDER OF THE CERTIFICATE**

3639 Other financial institution administrators

**(\*) Explanatory notes:**

This document is designed to provide additional information about the specified certificate and does not serve as a legal certificate of vocational qualification. The format of the description is based on the following documents:

Council Resolution 93/C 49/01 of 3 December 1992 on the transparency of qualifications; Council Resolution 96/C 224/04 of 15 July 1996 on the transparency of vocational training certificates, and Recommendation 2001/613/EC of the European Parliament and of the Council of 10 July 2001 on mobility within the Community for students, persons undergoing training, volunteers, teachers and trainers.

More information on transparency is available at: <http://europass.cedefop.europa.eu/>

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## 5. OFFICIAL BASIS OF THE CERTIFICATE

<p><b>Name and status of the institute issuing the certificate</b></p>	<p><b>Name and status of the national/regional authority providing accreditation/recognition of the certificate</b></p> <p>In the case of vocational qualifications belonging to the competence of the Ministry of Finance (PM), a vocational qualification-related independent professional committee commissioned by the PM</p>															
<p><b>Level of the certificate (national or international)</b></p> <p><b>Level of vocational qualification according to the National Qualification Register:</b></p> <p>54 Higher level vocational qualification entitling the holder to fill positions characteristically requiring intellectual work, which is based on the input competence determined in the vocational and examination requirements, on preliminary vocational qualification or on the baccalaureate.</p> <p><b>ISCED97 code:</b> 4CV</p>	<p><b>Grading scale / Pass requirements</b></p> <p>The average of the percentage of the performance achieved per examination part, taking into consideration the vocational and examination requirements, expressed as a grade:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">81-100%</td> <td style="width: 50%;">excellent (5)</td> </tr> <tr> <td>71-80%</td> <td>good (4)</td> </tr> <tr> <td>61-70%</td> <td>satisfactory (3)</td> </tr> <tr> <td>51-60%</td> <td>pass (2)</td> </tr> <tr> <td>0-50%</td> <td>fail (1)</td> </tr> </table>		81-100%	excellent (5)	71-80%	good (4)	61-70%	satisfactory (3)	51-60%	pass (2)	0-50%	fail (1)				
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<p><b>Certificate number:</b></p> <p>PT K</p> <p><b>Serial number:</b></p> <p>123456</p>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">2008-06 Analysis of the economic and financial environment (the bank's economic environment)</td> <td style="width: 20%; text-align: center;">100%</td> </tr> <tr> <td>2009-06 Applying accounting and balance sheet analysis basics</td> <td style="text-align: center;">100%</td> </tr> <tr> <td>2010-06 Tasks related to legal knowledge</td> <td style="text-align: center;">100%</td> </tr> <tr> <td>2011-06 Financial markets - market calculations</td> <td style="text-align: center;">100%</td> </tr> <tr> <td>2012-06 Bank account tasks (bank products, bank operations, banking markets)</td> <td style="text-align: center;">100%</td> </tr> <tr> <td>2013-06 Execution of loan transactions</td> <td style="text-align: center;">100%</td> </tr> <tr> <td>2015-06 Application of personal financial planning know-how</td> <td style="text-align: center;">100%</td> </tr> </table>		2008-06 Analysis of the economic and financial environment (the bank's economic environment)	100%	2009-06 Applying accounting and balance sheet analysis basics	100%	2010-06 Tasks related to legal knowledge	100%	2011-06 Financial markets - market calculations	100%	2012-06 Bank account tasks (bank products, bank operations, banking markets)	100%	2013-06 Execution of loan transactions	100%	2015-06 Application of personal financial planning know-how	100%
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<p><b>Access to next level of education/training</b></p> <p>Advancement to higher education</p>	<p><b>International agreements</b></p>															
<p><b>Other information concerning the vocational training process</b></p>																
<p><b>Legal basis</b></p> <p>Act LXXVI of 1993 on Vocational Training, Act No. 23/2008. (VIII. 8.) PM.</p>																

## 6. OFFICIALLY RECOGNISED WAYS OF ACQUIRING THE CERTIFICATE

Description of vocational education and training received	Percentage of total programme %	Duration (hours/weeks/months/years)
School-/training centre-based	Theory: 70 % Practice: 30 %	
Workplace-based		
Accredited prior learning		
Total duration of the education/training leading to the certificate		1200 hours
<b>Entry requirements:</b> Secondary school-leaving examination  This certificate supplement was prepared on the basis of the instruction for filling in the Certificate Supplement published on the homepages of the National Reference Point and the National Europass Centre. <b>National Reference Point – NSZFH – <a href="http://nrk.nive.hu">http://nrk.nive.hu</a></b>		
Head of Examination Organiser: Issue date: 2021.06.18		SEAL