

**CFP BOARD**







CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

# CFP BOARD REMOTE TESTING POLICY

Remote proctoring is an exam delivery method that allows candidates to take the CFP® exam from home or a location of their choice, rather than at a Prometric test center.

# SYSTEM REQUIREMENTS

Candidates must possess a computer that meets the ProProctor system requirements to take the CFP® exam remotely. The listed in the checklist below:

	<b>Screen Resolution:</b> 1920 X 1080	<input type="checkbox"/>
	<b>Operating System:</b> Windows / MacOS	<input type="checkbox"/>
	<b>Microphone:</b> Enabled	<input type="checkbox"/>
	<b>Webcam:</b> 640 X 480p	<input type="checkbox"/>
	<b>Download Speed:</b> 500 Kbps	<input type="checkbox"/>
	<b>Upload Speed:</b> 10,137 Kbps	<input type="checkbox"/>

# BREAK POLICY

## SCHEDULED BREAK

A 40-minute scheduled break will begin upon completion of section one or when time expires, whichever comes first. During your break you may leave the testing room to obtain food, water, or whatever you may need. Please be sure that you are back to your seat by the end of the 40-minute session as your exam will automatically begin as soon as the 40 minutes have expired.

## UNSCHEDULED BREAKS

You will be allowed to leave the exam room during an unscheduled break to use the restroom or get a drink of water. **You are not allowed to access your cell phone or study materials during unscheduled breaks.** Please be aware that during an unscheduled break no additional time is provided, and the check-in process will be repeated when you return to the exam room (security check of testing environment and person)

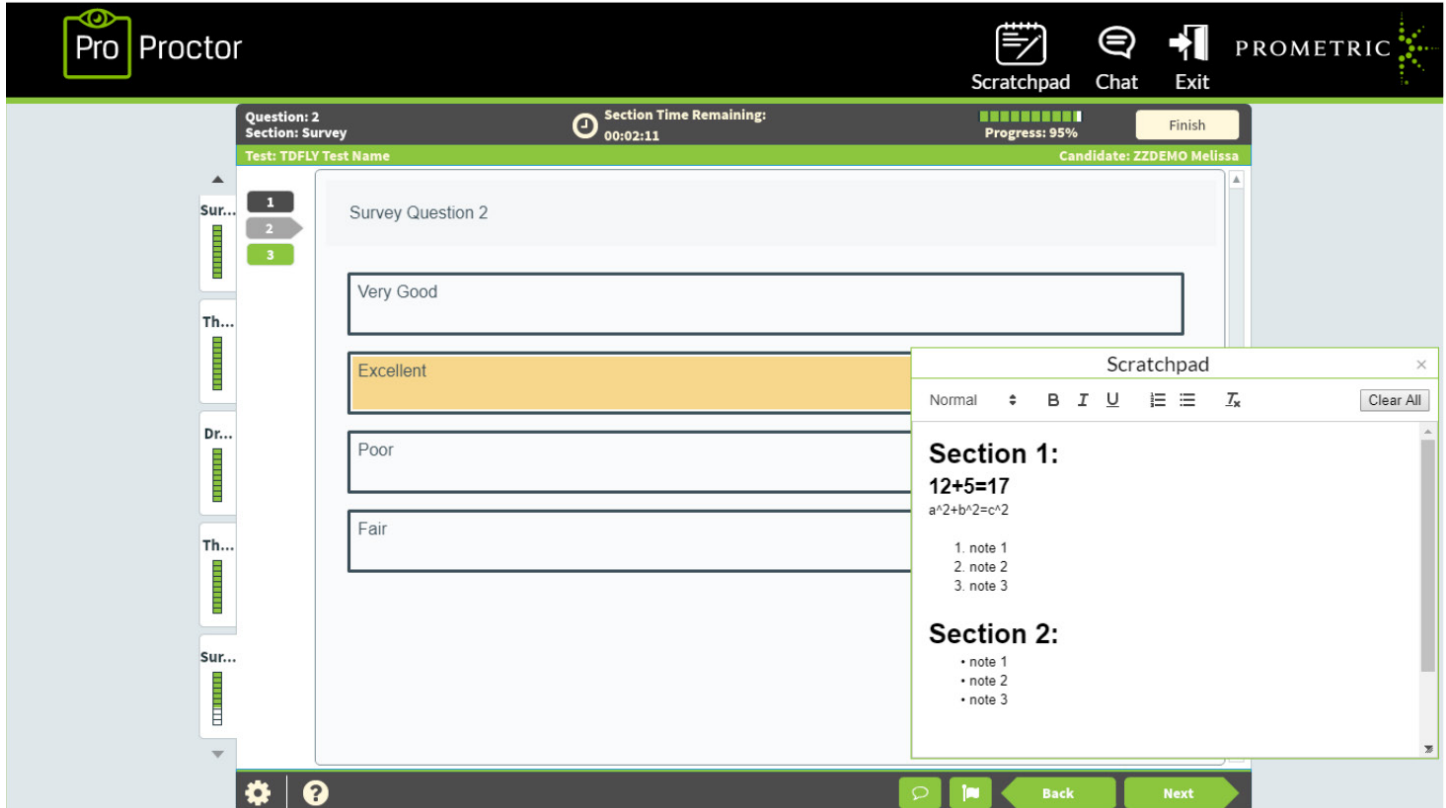
If you need an unscheduled break, **please raise your hand** so that a Test Center Administrator may properly check you out of the exam.

***After completing a section in the exam, candidates will not be able to access the previous section.***

CFP® EXAM STRUCTURE	ALLOTTED TIME
Non-disclosure agreement	2 minutes
Tutorial	5 minutes
Section 1a [43 items]	
Optional Unscheduled Break	180 minutes
Section 1b [42 items]	
Scheduled Break	40 minutes
Section 2a [43 items]	
Optional Unscheduled Break	180 minutes
Section 2b [42 items]	
Survey	5 minutes

## SCRATCH PAPER/NOTE BOARDS

Candidates are prohibited from using scratch paper or erasable whiteboards while taking the exam remotely. Instead, a virtual scratch pad is provided to remote testing candidates for notetaking during the exam.



## CALCULATOR POLICY

The CFP® exam will include the basic calculator onscreen. Candidates will also be allowed to use one of the financial calculators listed below. Proctors will require candidates to clear the calculator memory during the check-in process. Calculators containing visible formulas must be covered with black electrical tape or by taping blank paper over the formulas. It is your responsibility to clear the calculator's memory. Loose batteries (without packaging) are permitted in the testing area.

### CALCULATOR

Candidate can use one or more of the following calculator models listed below. **No other calculator models are allowed.**

- Hewlett Packard 10B
- Hewlett Packard 10bII
- Hewlett Packard 10bII+
- Hewlett Packard 12C
- Hewlett Packard 12C Platinum
- Hewlett Packard 17bII+
- Sharp EL-733 Business/Financial Calculator
- Sharp EL-733a Business/Financial Calculator
- Sharp EL-738 Business/Financial Calculator
- Texas Instruments BA II Plus
- Texas Instruments BA II Plus Business Analyst
- Texas Instruments BA II Plus Professional
- Texas Instruments BA-35

For all models listed, both solar and battery versions are acceptable.

## INSTRUCTIONS FOR ERASING CALCULATOR MEMORY

### Hewlett Packard 10B

1. Press and then release the **CLEAR ALL** key.
2. Press and then release the **CLE** key.

### Hewlett Packard 10bII

1. Press and hold down the **ON** key, then press and hold down both **N** and **FV**.
2. Release all three keys.
3. When all three keys are released, the memory is cleared and the “All Clear” message is displayed.

### Hewlett Packard 10bII+

1. Press and hold down the **ON** key, then press and hold down both **N** and **FV**.
2. Release all three keys.
3. When all three keys are released, the memory is cleared and the “All Clear” message is displayed.

### Hewlett Packard 12C

1. Turn the calculator off.
2. Hold down the Minus **-** key and press the **ON** key.
3. When memory has been reset, the “Pr Error” message is displayed (this is normal). Press any key to clear this message from the display.

### Hewlett Packard 12C Platinum

1. Turn the calculator off.
2. Hold down the Minus **-** key and press the **ON** key.
3. When memory has been reset, the “Pr Error” message is displayed (this is normal). Press any key to clear this message from the display.

### Hewlett Packard 17bII+

1. Press and hold down the **CLR** key, the leftmost menu key, and the rightmost menu key. (Press the three keys simultaneously.)
2. Release all three keys.
3. When the three keys are released, the “MEMORY LOST” message is displayed (this is normal).

### Sharp EL-733 Business/Financial Calculator

Press **2nd** **C CE** to clear the memory.

### Sharp EL-733a Business/Financial Calculator

Press **2nd** **C CE** to clear the memory.

### Sharp EL-738 Business/Financial Calculator

1. Press **2ndf** **M-CLR** to display the menu.
2. Press **0** **0** or **0** **=**.

### Texas Instruments BA II Plus

1. Press and then release the **2nd** key.
2. Press and then release the **MEM** key.
3. Press and then release the **2nd** key.
4. Press and then release the **CLR WORK** key.

### Texas Instruments BA II Plus Business Analyst

1. Press and then release the **2nd** key.
2. Press and then release the **MEM** key.
3. Press and then release the **2nd** key.
4. Press and then release the **CLR WORK** key.

### Texas Instruments BA II Plus Professional

1. Press and then release the **2nd** key.
2. Press and then release the **MEM** key.
3. Press and then release the **2nd** key.
4. Press and then release the **CLR WORK** key.

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## INTERNET CONNECTIVITY RECOMMENDATIONS

### TO AVOID INTERNET CONNECTIVITY PROBLEMS:

- Have a stable internet connection
- Identify the place in their house where Wi-Fi is strongest and test there. CFP Board recommends direct hardwired internet connection instead of Wi-Fi.
- Do not have other family members using up internet bandwidth with Netflix, social media, etc.

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## RESCHEDULING POLICY IN THE EVENT OF A DISRUPTION TO THE REMOTE TEST.

Candidates can report connectivity issues to Prometric. Upon review and approval by CFP Board, candidates may receive one opportunity to take the exam again remotely or at a test centre (contingent on appointment availability).

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## RETAKE POLICY

Individuals may attempt the exam a maximum of three times within a 24-month period. If an individual attempts the exam on three successive administrations, a one-year sit-out period (three exam administrations) is required before registering for another attempt.

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## CONFIDENTIALITY OF EXAM CONTENT/SYSTEMS

- The remote proctoring application, computer-based test delivery system, tutorial, exam content, your exam answers, your notes during the exam, and the survey (collectively “Exam Materials”) are the confidential and proprietary materials and intellectual property of CFP Board
- Communicating, publishing, reproducing, or transmitting any part of any Exam Materials, in any form or by any means (e.g. verbal, electronic, written, etc.) for any purpose is strictly prohibited.
- ANY reproduction or disclosure of any Exam Materials, in whole or in part, will result in immediate notification to your test sponsor and potential filing of administrative, civil and/or criminal charges against you and anyone directing or conspiring with you.
- This provision is in addition to, and not in lieu of, any other confidentiality requirements to which you have agreed.

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## TEST ENVIRONMENT POLICY

### ENVIRONMENTAL REQUIREMENTS

Your office or home setting must meet the following requirements:

- Testing location must be indoors (walled), well lit, with a closed door and free from background noise and disruptions.
- No third party may be present in the room or enter the room for the duration of the exam. If this occurs, your exam will be terminated and/or your results invalidated.
- Your workstation and surrounding area must be free of pens, paper, electronic devices, etc. No content that could potentially provide an unfair advantage during your exam, including that posted on walls or within your immediate area, should be present during your exam session.

### CHECK-IN PROCESS

- Original, valid (unexpired), government issued photo & signature bearing identification is required in order to take an exam.
- You will be required to show your workstation and surrounding area.
- You will be required to raise your pants legs above your ankles, empty and turn all pockets inside-out and raise shirt sleeves above your wrists prior to every entry into the online test. If you are wearing eyeglasses you will be required to remove them for visual inspection to ensure they don't contain a recording device.
- Large jewelry items must be removed from your person prior to and throughout the duration of the exam.
- If you have long hair that covers your ears, you will be asked to pull your hair back to ensure nothing is attached to your ear that could provide an unfair advantage (such as a Bluetooth earpiece).
- Leaving the camera view while the exam is in progress is strictly prohibited.

## **PROHIBITED ITEMS AND EXAMINEE CONDUCT IN THE VIRTUAL TEST CENTER**

- Unauthorized personal items may not be accessible while testing. Such items include, but are not limited to: outerwear, hats, food, drinks, purses, bags or briefcases, notebooks, watches, cell phones, electronic devices, or wearable technology.
- Eating, drinking, smoking, and chewing gum are prohibited during the exam.
- Written notes, published materials and other testing aids are strictly prohibited.
- Light clothing items removed for comfort such as sweaters, suit jackets, scarves, etc., must be hung on the examinee's chair, not placed in laps or on the workstation desktop. Outerwear such as heavy coats, parkas, rain coats, etc., is not permitted in the immediate testing area.
- Changing location while testing, turning off lighting or audio, speaking to or receiving aid from other individuals is strictly prohibited.
- Candidates are required to be professional, civil and respectful at all times while testing.
- All exams are continuously monitored by video and audio recording.
- If you do not wish to be recorded (either by video or audio), please notify the proctor immediately of your intent not to proceed with the exam.

## **REMOTE TESTING CANDIDATES ARE REQUIRED TO AGREE TO THE FOLLOWING:**

1. I am the person I represent to be for the exam session.
2. I understand that I will be monitored at all times during the exam- to ensure strict adherence to security measures. Monitoring shall include audio and video recording.
3. I will not remove or attempt to remove, whether through physical means, a recording device or otherwise, any written, printed, electronic or recorded examination questions or answers, in whole or in part.
4. I will not electronically capture or attempt to capture any examination content from my computer screen.
5. I will not reproduce or attempt to reproduce examination materials through memorization or any other means. This prohibition includes but is not limited to discussing, posting or disclosing such content via email, social media or other Internet presence, or otherwise. I understand that this disclosure prohibition applies before, during and after my session.