



**GIVE BETTER ADVICE.  
EARN MORE INCOME.  
GAIN GREATER TRUST.**

**BUILD YOUR FUTURE BY HELPING OTHERS BUILD THEIRS**

At a time when many Americans are struggling to pull their finances together, you can make an impact by helping them solve financial problems, meet their financial goals, and serve as their trusted advisor, counselor and coach. As a CFP® professional, you commit to working in your clients' best interests, you will stand out from financial advisors who have not earned CFP® certification, and prospective clients will know you are their best choice for an advisor. At the same time, you'll advance in a fulfilling career and earn more income as a CERTIFIED FINANCIAL PLANNER™ professional.

To get started on your path to certification,  
call **800-487-1497** or go to **CFP.net**

**CFP BOARD**

# FOUR STEPS TO CERTIFICATION



The financial planning career path is expected to grow more than 15% in the coming decade, according to the U.S. Labor Department. And *U.S. News and World Report* ranks Financial Advisor as #6 in Best Business Jobs for 2020. Baby boomers are approaching or reaching retirement age, and millions of Generation Xers are raising families and saving for their later years. Many will require professional guidance to plan for their economic futures. As a CFP® professional, you can get personal satisfaction from helping them plan for their futures while simultaneously building your career.

Earning CFP® certification requires a solid grounding in financial planning. Those who have become CFP® professionals will tell you that the work is worth the effort. More than 90% of CFP® professionals say they would recommend CFP® certification to other financial professionals. The process of earning CFP® certification consists of four steps intended to make sure that those who obtain certification have met the competency and ethical standards necessary to use the CFP® certification marks.

# 1

## COMPLETE THE EDUCATION REQUIREMENT

Online or in-person classes are offered through more than 300 CFP Board Registered Programs across the country. CFP Board will consider granting credit for previous educational coursework towards the education requirement for CFP® certification based on a Transcript Review. If you hold one of the CFP Board-approved degrees, licenses, or credentials, you are eligible for the Accelerated Path and only need to complete the Capstone course. A bachelor's degree is required for CFP® certification but not required to sit for the exam.

# 2

## PASS THE EXAM

After you have completed the education requirement, you can sit for the CFP® exam. It's a comprehensive, 6-hour computer-based test. The exam is offered three times a year at more than 265 convenient Prometric testing centers nationwide. A review course is not required for the exam but many candidates find it helpful. Review course information is available online or through your education provider. CFP Board also offers practice exams to help prepare candidates for the CFP® exam.

# 3

## MEET THE EXPERIENCE REQUIREMENT

In order to become certified, you will need professional experience in the personal financial planning process. You can acquire this work experience at any stage during the certification process, including before or after passing the exam. You'll need at least two years experience working directly with clients under the supervision of a CFP® professional, or three years of other qualified professional experience related to financial planning, which can include supervision, teaching and/or internships. Candidates for CFP® certification can enter and track their qualifying experience on an ongoing basis using the CFP Board's online *Experience Profile* tool.

# 4

## PASS THE FITNESS STANDARDS AND BACKGROUND CHECK

The final step is to pass a background check. CFP Board checks for such issues as civil or criminal convictions and revocation of professional licenses. Going through the background check and agreeing to the CFP Board's *Standards of Professional Conduct* demonstrates to the public that you have agreed to provide personal financial planning in the client's best interest and to act in accordance with the highest ethical and professional standards for the practice of financial planning.

## GET THE CFP® CERTIFICATION ADVANTAGE

CFP® professionals are generally considered to be among the most knowledgeable and respected advisors in personal financial planning. For anyone interested in advancing their career in financial planning or financial services, attaining CFP® certification is the most effective way to achieve career success.

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