Kick-Start Your Career with a Free Webinar!

We’d like to invite anyone interested in CFP® certification to view our informational webinar to learn more.

Choose a Session >>

“Kaplan did an outstanding job of putting me in a position to succeed on the national CFP® exam. Their instructors, online classes, and course materials are first class. I would recommend Kaplan to anyone looking to obtain their CFP® certification.”

Kevin T.

CFP® certification is the recognized standard of excellence for personal financial planning. The Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® marks and is accountable to the public by fostering personal financial planning professional standards through the setting and enforcement of education, examination, experience, and ethics (the Four Es) requirements.

Kaplan Financial Education:
Your dedicated CFP® certification prep and continuing education partner.

The path to achieving CFP® certification is challenging, but you can trust Kaplan’s study tools and support to navigate through the curriculum and earn your CFP® mark.

You may be wondering:

• What is the value of CFP® certification in today’s market?
• What are the education and work experience prerequisites?
• What concepts will I learn?
• How is the exam formatted?
• What is the time commitment?
• How do I prepare for the CFP® exam?

As your committed CFP® certification prep partner, we’ve developed this guide to introduce you to the benefits of CFP® certification and “the Four Es,” summarize the steps needed to obtain and maintain your CFP® certification, and highlight our exam prep programs.
**Education**

**CFP Board’s Knowledge Criteria**

Each candidate must meet the knowledge criteria set forth by CFP Board prior to sitting for the exam. There are three ways candidates can fulfill the required comprehension of the nearly 100 integrated financial planning topics:

- **Option A:** Complete a CFP Board-Registered Program.
  - Academic programs include credit and non-credit certificate programs, as well as undergraduate and graduate degree programs.
  - CFP Board-registered programs, such as Kaplan’s, are offered across the country.

- **Option B:** Apply for a Challenge Status.
  - Academic degrees and credentials that fulfill CFP Board education requirement* include:
    - Certified Public Accountant (CPA) – inactive license acceptable
    - Licensed attorney – inactive license acceptable
    - Chartered Financial Analyst® (CFA®)
    - Doctor of Business Administration
    - Chartered Financial Consultant® (ChFC®)
    - PhD in business or economics
    - Chartered Life Underwriter® (CLU®)

- **Option C:** Request a Transcript Review.
  - Successful completion of upper-division level college courses or certain industry credentials recognized by CFP Board may satisfy some or all of the education requirements. Industry credentials include:
    - Associate of Society of Actuaries (ASA)
    - Certified Employee Benefits Specialist (CEBS)
    - Enrolled Agent (EA)
    - Fellow of the Society of Actuaries (FSA)

**Bachelor’s Degree Requirement**

Candidates must earn a bachelor’s degree from an accredited college or university within five years after passing the exam to receive CFP® certification. Attaining a bachelor’s degree is not a requirement to be eligible to take the CFP® exam and does not have to occur before sitting for the exam or fulfilling the work experience.

* Not including Course 107
Examination

Work Experience, Ethics Requirement, and CFP® Certification Renewal

Work Experience

Three years of full-time relevant personal financial planning experience or two years of full-time Apprenticeship experience that meets additional requirements is required to receive certification. This experience must be completed in ten years preceding the exam and within five years after the exam in order to receive CFP® certification. Qualifying experience must fit within one or more of CFP Board’s primary elements of personal financial planning:

- Establishing and Defining the Relationship with the Client
- Gathering Client Data, Including Goals
- Analyzing and Evaluating the Client’s Current Financial Status
- Developing and Presenting Financial Planning Recommendations and/or Alternatives
- Implementing the Financial Planning Recommendations
- Monitoring the Financial Planning Recommendations

Ethics Requirement

Applicants for CFP® certification must pass CFP Board’s Candidate Fitness Standards, which outlines conduct that prohibits an individual from being certified. A background check is also conducted.

CFP® Certification Renewal Requirements

Once certified, CFP® professionals must complete three renewal requirements every two years:

- Submit a one-time, non-refundable certification application fee of $100 for a background check
- Pay a non-refundable $325 certification fee
- Complete a minimum of 30 hours of continuing education, including completion of 2 hours of CFP Board-approved Ethics CE

Eligibility

Candidates are able to register for the CFP® exam prior to completing the education coursework requirement, pending CFP Board receives verification by the verification deadline. Candidates are always eligible to register for the exam if their education has already been submitted to CFP Board by their Registered Program.

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<thead>
<tr>
<th>Topic</th>
<th>% of Exam</th>
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<tr>
<td>Professional Conduct and Regulation</td>
<td>7%</td>
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<tr>
<td>General Financial Planning Principles</td>
<td>17%</td>
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<td>Education Planning</td>
<td>6%</td>
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<td>Risk Management and Insurance Planning</td>
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<td>Investment Planning</td>
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<td>Tax Planning</td>
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<td>Retirement Savings and Income Planning</td>
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<tr>
<td>Estate Planning</td>
<td>12%</td>
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A completed application, including a payment of $595 and the proper documentation, must be received by the exam application deadline.

View current exam dates and registration dates at CFP.NET >>

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## Study Solutions to Fit Your Lifestyle

We know you have a busy life. Let us help you master the 8 major domains of the CFP® exam on your schedule... in the way you want to study.

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<th>Live Online Class</th>
<th>Self-Study</th>
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<td>Enroll in one of our Premium Packages and receive the Accelerated Financial Planning Program, delivered via our Live Online Class. Complete the education program in just 9 months, and take all your quizzes and exams online. Begin your class in March, July, or November, and sit for the exam one year later.</td>
<td>Complete your education on your own schedule with an Essential Package. With these packages, you can begin your program at any time, and take up to 90 days to complete each course.</td>
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<th>PremiumPlus™ Package</th>
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<td>• Premium Review</td>
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### University Partner Programs

Leading universities across the country have partnered with Kaplan to offer traditional classes and/or self-study online programs. Our university programs are 9 or 12 months and begin in January, April, or September. With the combination of prestigious university instructors and Kaplan’s time-tested study materials, you will be on the track for CFP® exam success in a university program.

**VIEW UNIVERSITY PROGRAMS >>**

### Challenge Candidates

Do you already hold a professional designation? Your skills and experience can help you achieve CFP® certification more quickly than other candidates.

**Private, customized corporate programs are also available! Call for details.**

[LEARN MORE >>](#)
Committed to Your Exam Success

Bring everything you’ve learned in your education program together with a Review Package. Choose from an Onsite, Live Online, or OnDemand Class, or self-study option. No matter which method you choose, Kaplan’s bite-size review videos, easy to comprehend textbooks, expert faculty and robust online tools will leave you feeling confident and prepared for exam day.

LEARN MORE >>

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<th>Exam Review Packages</th>
<th>Premium Review $1,348</th>
<th>Essential Study Solution $449</th>
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Kaplan’s PassProtection™

No need to jump through hoops to figure out if you qualify for our PassProtection™. We designed our pass guarantee to be simple: if you attended a Review Class and did not pass the exam, you will receive a free Live Review Class within a one-year window of time.

CALL FOR DETAILS

Kaplan has partnered with top firms across the country to offer CFP® certification education and exam review at an exclusive discount. Call to see if you qualify.

Note: You may qualify for a discount. Call for details. OnDemand Review Class available beginning in July 2018.