KAPLAN® FINANCIAL EDUCATION | CFP® Exam Prep

Syllabus

Onsite Review for the CFP® Exam

DAY	TIME	TOPICS*
Day 1	8:00 am–10:00 am 10:00 am–12:00 pm 12:00 pm–1:00 pm 1:00 pm–3:00 pm 3:00 pm–5:30 pm	Fundamentals Insurance Lunch** Insurance Investments
Day 2	8:00 am–12:00 pm 12:00 pm–1:00 pm 1:00 pm–5:30 pm	Investments Lunch** Income Tax
Day 3	8:00 am–9:00 am 9:00 am–12:00 pm 12:00 pm–1:00 pm 1:00 pm–5:30 pm	Income Tax Retirement Lunch** Retirement
Day 4	8:00 am–10:00 am 10:00 am–12:00 pm 12:00 pm–1:00 pm 1:00 pm–4:00 pm	Retirement Estates Lunch** Estates

*Topics subject to change.
**Lunch is on your own.

PRE-CLASS ASSIGNMENTS:

It is important to complete assignments in the 10-Week Study Planner Checklist for each topic prior to attending class.

CLASS MATERIALS NEEDED:

- Class Guide
- Your financial calculator (HP-10bII/HP-10bII+ is recommended)
- Pens, pencils, and notepads

Dress comfortably and layer your clothing.

CONTACTS:

If you have any questions about your review class, please contact a Student Relations Specialist at *srs@kaplan.com* or call 800.373.0199.

TECH SUPPORT:

For technical support, call 800.824.8742, option 2, or email online@kaplan.com. Technical support hours (live and email) are Monday–Thursday, 8 am–10 pm ET, and Friday, 8 am–9 pm ET. Email support is also available on weekends.