

Guide to CFP® Exam Preparation


 NAVIGATE
OVERVIEW

 EDUCATION
REQUIREMENTS

 EXAMINATION
& EXPERIENCE

 KAPLAN
EDUCATION

 KAPLAN
EXAM PREP

Kick-Start Your Career with a Free Webinar!

We'd like to invite anyone interested in CFP® certification to attend a 30-minute live webinar to learn more.

Visit www.getfpcertified.com for dates and times.

“The instructors were committed to my success. Their availability to us was exceptional, the course material timely and focused, and the computer course work clear and appropriate to the CFP® exam. Supplemental study and information was available in abundance while at the same time easy to navigate. Kaplan gets my strong voice of approval and gratitude.”

Steven A. Egland

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 & continuing education partner.

Kaplan offers the study tools and support you need to navigate and earn your CFP® certification. The path to achieving CFP® certification is challenging. 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.

Free Resources:

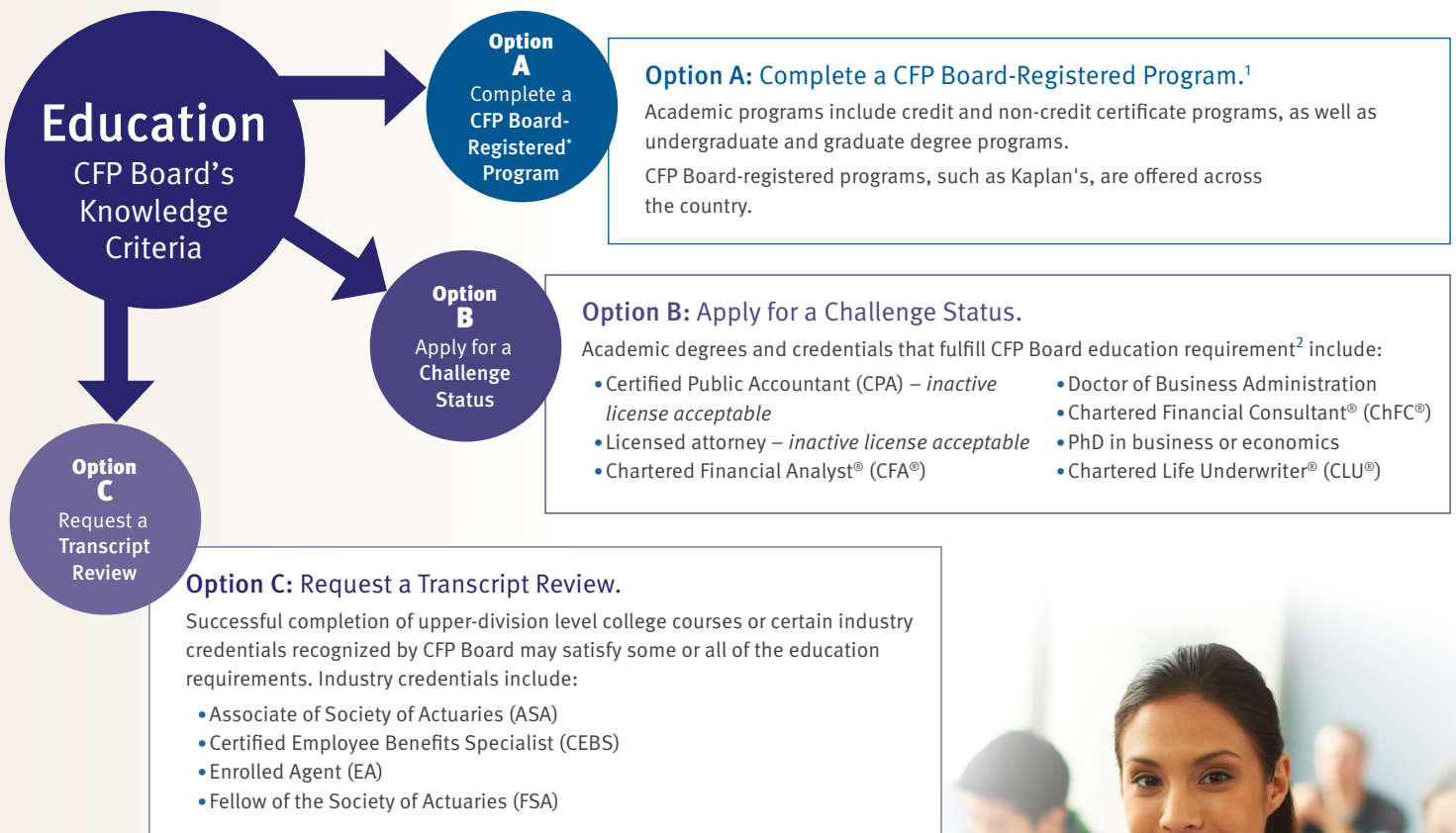
[Why CFP® Certification?](#)
[Why Kaplan?](#)
www.getfpcertified.com

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:

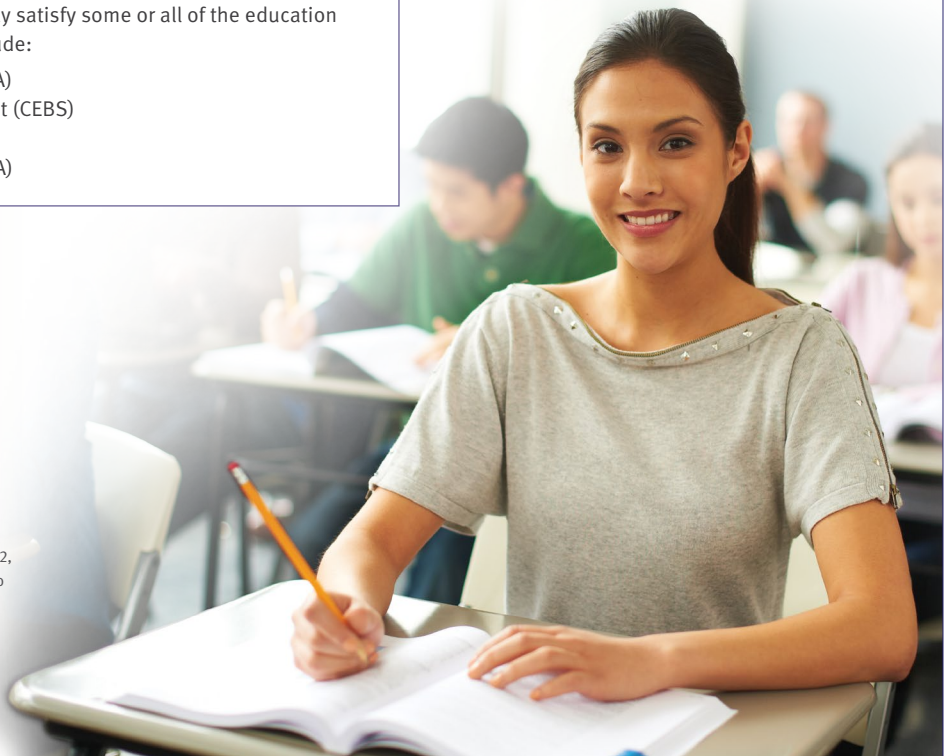


Bachelor's Degree Requirement

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.

¹ Students who began their education program with Kaplan prior to January 1, 2012, and complete the entire education program within four years, are not required to take AccFP 107 Financial Plan Development Course.

² Not including AccFP 107



Examination

Exam Format

The CFP® exam is offered in a computer-based format during a 5-day testing window. The exam is administered on one day during two 3-hour testing sessions with a scheduled 30-minute break in between. Candidates can choose their test day (Tuesday–Saturday) and one of Prometric’s 250 convenient locations.

Exam Date	Registration Period
March 24-28, 2015	December 8, 2014 - March 10, 2015

A completed application, including a payment of \$595 and the proper documentation, must be received by the exam application deadline. For future exam dates, please visit the CFP Board website: www.cfp.net.

Topic	% of Exam
Establishing and Defining the Client-Planner Relationship	8%
Gathering Information Necessary to Fulfill the Engagement	9%
Analyzing and Evaluating the Client’s Current Financial Status	25%
Developing the Recommendation(s)	25%
Communicating the Recommendation(s)	9%
Implementing the Recommendation(s)	9%
Monitoring the Recommendation(s)	5%
Practicing within Professional and Regulatory Standards	10%

Eligibility

Candidates are eligible to apply for the CFP® exam after successfully completing an adequate course of study (or its equivalent). The bachelor’s degree requirement is a condition of initial certification and does not need to occur before sitting for the exam or fulfilling the work experience.

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. For more information, visit www.cfp.net/become/fitness.asp.

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

Efficient, Effective, Customized Required Education.

Kaplan's CFP[®] Board-registered programs provide the focus and structure you need to master the 8 major domains covered on the CFP[®] exam. Choose from a traditional or virtual classroom, or a self-study online program, and sit for the exam in just 12 months!

1 Accelerated Financial Planning Program (AccFP)

This time-tested program (our most popular) keeps you on task while providing individual flexibility.

- › Study how and when you want
- › Choose your live class (virtual or traditional)
- › Complete your required education in 9 months
- › Receive eBook or textbook, online testing and email access to instructors
- › No hidden fees
- › Start your program in March, July, or November

[Learn More](#)

2 Self-Study Online Program

You can purchase each course (101-106) for \$549; Course 107 is offered only in an instructor-led virtual format for \$749. With this online program, you will:

- › Set your own completion schedule (up to 3 months access per course)
- › Receive eBook, online testing, interactive study activities, and email access to instructors
- › No hidden fees
- › Start whenever you want

[Learn More](#)

3 University Partner Programs

Choose from leading universities across the country (9- and 12-month programs offered). With this program, you will:

- › Learn from instructors who are CFP[®] professionals
- › Receive supplemental online study tool
- › Start time varies by university

[Learn More](#)

AccFP Premium Study Solution \$749 per course

- Live Instruction
(virtual or traditional)
- Textbooks/eBook
- QBank
- InstructorLink[™]

Bundled Study Solution:

PremiumPlus[™] Study Solution | \$5,599

Includes the **Premium Study Solution** for all 7 courses **PLUS** the **Premium Live Review** (save over \$900)

Note: You may qualify for a discount. Call for details.

Already hold an additional designation?

Your skills and experience gained through earning other designations can help you achieve CFP[®] certification more quickly than others. Call for details!

CFP[®] Exam Flashcard App

Another study tool at your fingertips, with over 1,000 question-and-answer drills.

[Download Now >>](#)



NAVIGATE
OVERVIEW

 EDUCATION
REQUIREMENTS

 EXAMINATION
& EXPERIENCE

 KAPLAN
EDUCATION

**KAPLAN
EXAM PREP**

Choose the Live Review that's right for you.

- Stay focused and finish strong in the final weeks leading up to your exam
- Zero in on the critical content you studied in your required education program
- Learn valuable test-taking tips and strategies for exam day

[Learn More](#)
Kaplan Education Students SAVE \$100 on Live Review!

Exam Prep Study Solution Options	Premium (Live Review & Essential) \$1,348	Essential \$449
Classroom Instruction	Traditional or Virtual	
10-Week Study Planner	•	•
Diagnostic Exam	•	•
Pre-Study Videos	•	
In-Class Guide	•	
Case Videos	•	
Mock Exam Video	•	
Online Mock Exam	•	
Kaplan Schweser Review for the CFP® Exam Volumes 1–7	•	•
QBank (3,000 questions)	•	•
InstructorLink™	•	•
Core Lecture Videos	•	•
Exam Tips Videos	•	•
Instructor-Led Webinars	•	•
Instructor Email Access	•	•
Schweser PassProtection™	•	•

Note: You may qualify for a discount. Call for details.

Kaplan's Pass Protection™

If you do not pass the CFP® exam after purchasing a Live Review Study Solution, you will receive a free subsequent Live Review Study Solution within a one-year window of time (three exam cycles).

Call for details.

Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and federally registered CFP (with flame logo) in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements. Kaplan University does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP (with flame logo) certification marks. CFP® certification is granted only by Certified Financial Planner Board of Standards, Inc. to those persons who, in addition to completing an educational requirement such as this CFP Board-Registered Program, have met its ethics, experience, and examination requirements. Kaplan Financial Education and Kaplan University are review course providers for the CFP® Certification Examination administered by Certified Financial Planner Board of Standards, Inc. CFP Board does not endorse any review course or receive financial remuneration from review course providers.