

CFP® certification education

September 2023–June 2024 Web-delivered virtual classroom program



Orientation sessions: 9/5/23 at 1 pm ET and 9/7/23 at 3 pm ET

Students completing this program cycle will be eligible to sit for the November 2024 CFP® Exam.

| | Fundamentals & Insurance | Investments | Tax | Retirement | Estate Planning |
|-----------------|-----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| | Tues/Thurs 7–9:30 pm ET | Tues/Thurs 7–9:30 pm ET | Tues/Thurs 7–9:30 pm ET | Tues/Thurs 7–9:30 pm ET | Tues/Thurs 7–9:30 pm ET |
| Class 1 | 9/12 | 11/7 | 1/16 | 3/12 | 5/7 |
| Class 2 | 9/14 | 11/9 | 1/18 | 3/14 | 5/9 |
| Class 3 | 9/19 | 11/14 | 1/23 | 3/19 | 5/14 |
| Class 4 | 9/21 | 11/16 | 1/25 | 3/21 | 5/16 |
| Class 5 | 9/26 | 11/21 | 1/30 | 3/26 | 5/21 |
| Class 6 | 9/28 | 11/28 MTR | 2/1 MTR | 3/28 MTR | 5/23 MTR |
| Class 7 | 10/3 MTR | 11/30 MT | 2/6 MT | 4/2 MT | 5/28 MT |
| Class 8 | 10/5 MT | 12/5 | 2/8 | 4/4 | 5/30 |
| Class 9 | 10/10 | 12/7 | 2/13 | 4/9 | 6/4 |
| Class 10 | 10/12 | 12/12 | 2/15 | 4/11 | 6/6 |
| Class 11 | 10/17 | 12/14 | 2/20 | 4/16 | 6/11 |
| Class 12 | 10/19 | 12/19 | 2/22 | 4/18 | 6/13 FER |
| Class 13 | 10/24 | 12/21 FER | 2/27 | 4/23 FER | 6/18 F |
| Class 14 | 10/26 | 12/28 F | 2/29 FER | 4/25 F | |
| Class 15 | 10/31 FER | | 3/5 F | | |
| Class 16 | 11/2 F | | | | |



Contact the CFP Board at **800-487-1497**
or visit their website at [cfp.net](https://www.cfp.net) for exam
dates and to register for the exam.



CFP® Capstone Course

Complete at your own pace by the following appropriate deadlines.

Phase 1

can be started
as early as after
completion of
Fundamentals &
Insurance

Phase 2

can be started
after completion
of Tax



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CFP® certification education

November 2023–August 2024 Web-delivered virtual classroom program



Orientation sessions: 10/31/23 at 1 pm ET and 11/2/23 at 3 pm ET

Students completing this program cycle will be eligible to sit for the November 2024 CFP® Exam.

| | Fundamentals & Insurance | Investments | Tax | Retirement | Estate Planning |
|-----------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| | Tues/Thurs 8–10:30 pm ET | Tues/Thurs 8–10:30 pm ET | Tues/Thurs 8–10:30 pm ET | Tues/Thurs 8–10:30 pm ET | Tues/Thurs 8–10:30 pm ET |
| Class 1 | 11/7 | 1/16 | 3/12 | 5/7 | 7/9 |
| Class 2 | 11/9 | 1/18 | 3/14 | 5/9 | 7/11 |
| Class 3 | 11/14 | 1/23 | 3/19 | 5/14 | 7/16 |
| Class 4 | 11/16 | 1/25 | 3/21 | 5/16 | 7/18 |
| Class 5 | 11/21 | 1/30 | 3/26 | 5/21 | 7/23 |
| Class 6 | 11/28 | 2/1 MTR | 3/28 MTR | 5/23 MTR | 7/25 MTR |
| Class 7 | 11/30 MTR | 2/6 MT | 4/2 MT | 5/28 MT | 7/30 MT |
| Class 8 | 12/5 MT | 2/8 | 4/4 | 5/30 | 8/1 |
| Class 9 | 12/7 | 2/13 | 4/9 | 6/4 | 8/6 |
| Class 10 | 12/12 | 2/15 | 4/11 | 6/6 | 8/8 |
| Class 11 | 12/14 | 2/20 | 4/16 | 6/11 | 8/13 |
| Class 12 | 12/19 | 2/22 | 4/18 | 6/13 | 8/15 FER |
| Class 13 | 12/21 | 2/27 FER | 4/23 | 6/18 FER | 8/20 F |
| Class 14 | 12/28 | 2/29 F | 4/25 FER | 6/20 F | |
| Class 15 | 1/2 FER | | 4/30 F | | |
| Class 16 | 1/4 F | | | | |



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CFP® Certification Education

January 2024 Instructor-Led Online program



Orientation session: 1/9/24 at 1 pm ET and 1/11/24 at 3 pm ET

Students completing this program cycle by the targeted completion date will be eligible to sit for the March 2025 CFP Exam. Two to three months of review and test preparation is recommended between program completion and exam date.



CFP® Capstone Course

Complete at your own pace by the appropriate deadline.

Phase 1
can be started
as early as after
completion of
Fundamentals &
Insurance

Phase 2
can be started
after completion
of Tax

| | Fundamentals & Insurance | Investments | Tax | Retirement | Estate Planning |
|-----------------|-----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| | Tues/Thurs 7–9:30 pm ET | Tues/Thurs 7–9:30 pm ET | Tues/Thurs 7–9:30 pm ET | Tues/Thurs 7–9:30 pm ET | Tues/Thurs 7–9:30 pm ET |
| Class 1 | 1/16/24 | 3/12/24 | 5/7/24 | 7/9/24 | 9/10/24 |
| Class 2 | 1/18/24 | 3/14/24 | 5/9/24 | 7/11/24 | 9/12/24 |
| Class 3 | 1/23/24 | 3/19/24 | 5/14/24 | 7/16/24 | 9/17/24 |
| Class 4 | 1/25/24 | 3/21/24 | 5/16/24 | 7/18/24 | 9/19/24 |
| Class 5 | 1/30/24 | 3/26/24 | 5/21/24 | 7/23/24 | 9/24/24 |
| Class 6 | 2/1/24 | 3/28/24 MTR | 5/23/24 MTR | 7/25/24 MTR | 9/26/24 MTR |
| Class 7 | 2/6/24 MTR | 4/2/24 Mid-Term Exam | 5/28/24 Mid-Term Exam | 7/30/24 Mid-Term Exam | 10/1/24 Mid-Term Exam |
| Class 8 | 2/8/24 Mid-Term Exam | 4/4/24 | 5/30/24 | 8/1/24 | 10/3/24 |
| Class 9 | 2/13/24 | 4/9/24 | 6/4/24 | 8/6/24 | 10/8/24 |
| Class 10 | 2/15/24 | 4/11/24 | 6/6/24 | 8/8/24 | 10/10/24 |
| Class 11 | 2/20/24 | 4/16/24 | 6/11/24 | 8/13/24 | 10/15/24 |
| Class 12 | 2/22/24 | 4/18/24 | 6/13/24 | 8/15/24 | 10/17/24 FER |
| Class 13 | 2/27/24 | 4/23/24 FER | 6/18/24 | 8/20/24 FER | 10/22/24 Final Exam |
| Class 14 | 2/29/24 | 4/25/24 Final Exam | 6/20/24 FER | 8/22/24 Final Exam | |
| Class 15 | 3/5/24 FER | | 6/25/24 Final Exam | | |
| Class 16 | 3/7/24 Final Exam | | | | |



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MTR: Mid-Term Review
FER: Final Exam Review



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