



COLLEGE FOR
FINANCIAL PLANNING®
A KAPLAN COMPANY

Let Us Be Your Guide to CFP® Certification

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COLLEGE FOR
FINANCIAL PLANNING®
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As the creator of the CERTIFIED FINANCIAL PLANNER™ certification, the College for Financial Planning®—a Kaplan Company has a rich heritage in financial planning education.* You can feel confident in choosing the College for all your CFP® certification needs.

OVERVIEW

EDUCATION
REQUIREMENTS

EXAMINATION
& EXPERIENCE

EDUCATION
PROGRAMS

EXAM PREP

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 »

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 E's) requirements.

Your Dedicated CFP® Certification Program Partner

The path to achieving CFP® certification is challenging, but you can trust our 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 partner, we've developed this guide to introduce you to the benefits of CFP® certification and "the Four E's," summarize the steps needed to obtain and maintain your CFP® certification, and highlight our programs.

*In 1969, the International Association for Financial Planners (IAFP) and the College for Financial Planning were created to help meet the financial needs of Americans.

In 1985, the College entered an agreement to establish an independent, nonprofit certifying and standards-setting organization. Ownership of the CFP® marks and responsibility for continuing the CFP® certification program was transferred to the new organization, International Board of Standards and Practices for Certified Financial Planners, Inc. (IBCFP), now known as CFP Board. For more information please visit www.cfp.net/about-cfp-board/history.

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Education

CFP Board's Knowledge Criteria

The education requirement helps to provide the knowledge necessary to deliver professional, competent, and ethical financial planning services to clients. There are three ways candidates can fulfill the required comprehension to be well-versed in the major personal financial planning areas.

Fulfill the Education Requirement

Option A

Complete a CFP
Board Registered
Program

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 are offered across the country. The College for Financial Planning®—a Kaplan Company's education program is a CFP Board Registered Program. The coursework you complete may also be eligible for prior learning credit toward[†] a Master of Science Degree in Personal Financial Planning.

In addition, the College's Master of Science in Personal Financial Planning is a CFP Board Registered Program that fulfills education requirements to sit for the national CFP® exam.

Option B

Qualify for
Accelerated
Path

Option B: Qualify for Accelerated Path

Academic degrees and credentials that may enable you to skip the majority of the coursework requirement[†] include:

- Certified Public Accountant (CPA)
- Chartered Financial Analyst® (CFA®)
- Certified Investment Management Analyst® (CIMA®)
- Chartered Financial Consultant® (ChFC®)
- Chartered Life Underwriter® (CLU®)
- Licensed Attorney
- Doctor of Business Administration
- PhD in financial planning, finance, business administration, or economics
- CFP® certification from the Financial Planning Standards Board Ltd. (FPSB) affiliate located in your territory of residence outside the U.S.

Option C

Request a
Transcript
Review

Option C: Request a Transcript Review

Successful completion of courses at a regionally accredited U.S. institution 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 5 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 capstone course



Examination

Exam Format

The CFP® exam is offered in a computer-based format during an 8-day testing window three times per year: March, July, and November. Candidates choose their test day and Prometric testing location and then sign up for a 7-hour testing window. The exam consists of check-in, two 3-hour testing sections (each subdivided into two subsections), and a scheduled 40-minute break. Each of the 170 exam questions are linked to at least one of the Principal Knowledge Topics.

[View Current Exam Dates
and Registration Date at CFP.NET »](#)

A completed exam registration form, including payment of a registration fee and the proper documentation, must be received by the exam application deadline.

PRINCIPAL KNOWLEDGE DOMAIN	% OF EXAM
Professional Conduct and Regulation	8%
General Principles of Financial Planning	15%
Risk Management and Insurance Planning	11%
Investment Planning	17%
Tax Planning	14%
Retirement Savings and Income Planning	18%
Estate Planning	10%
Psychology of Financial Planning	7%

Eligibility

Candidates are able to register for the CFP® exam prior to completing the education coursework requirement, pending CFP Board receives verification of your coursework completion by the education 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.

Work Experience, Ethics Requirement, and CFP® Certification Renewal

Work Experience

Professional experience (6,000 hours Standard Pathway) in relevant personal financial planning activities, or apprenticeship experience (4,000 hours Apprenticeship Pathway) that meets additional requirements, is required to meet the experience requirement. This experience must be completed in 10 years preceding the exam and/or within 5 years after the exam in order to receive CFP® certification.

[Read More on Experience
Requirement »](#)

Ethics Requirement

CFP® professionals agree to adhere to the high standards of ethics and practice outlined in CFP Board's Code of Ethics and Standards of Conduct. Applicants for CFP® certification must pass CFP Board's Candidate Fitness Standards, which outlines conduct that prohibits an individual from being certified. An ethics declaration is required, and a background check is also conducted.

[Read More on Ethics Requirements »](#)

CFP® Certification Continuing Education (CE) Requirements

Once certified, CFP® professionals are required to complete 30 hours of continuing education each reporting period: 2 hours of CFP Board Ethics CE and 28 hours of CE covering one or more of CFP Board's Principal Topics.



An Education That Builds Expertise and Fits Into Your Life

Created for working professionals, our program lets you study anytime, anywhere with support from faculty who bring more than 150 years of combined experience to your course. Study more effectively with a learning platform that evolves with you, guiding weekly coursework, identifying focus areas based on performance, and integrating an AI Tutor for instant support.

In our seven-course curriculum, you'll master all exam domains with instruction from CFP® professionals and industry experts. Beyond helping you pass the exam on your first try, our program teaches practical knowledge and on-the-job skills for success as a financial planner.

This career-focused approach is why approximately **one-third of all CFP® exam takers choose our program** over 300+ providers, and **more than 25,000 CFP® certificants have launched their careers here.**

Most completed coursework is eligible for prior learning credit toward a Master of Science in Personal Financial Planning. Our master's program is also a CFP Board Registered Program that fulfills the education requirement for CFP® certification.

[Learn More »](#)

University Partner Programs

Leading universities and colleges across the country partner with us to offer live onsite and/or self-study education programs. Our onsite partner programs are 9- or 12-months long and begin in January, April, and September. With the combination of reputable collegiate instructors and our time-tested study materials, you'll be on track to earn your Certificate in Financial Planning from one of many prestigious schools.

[View University Programs »](#)

Accelerated Path Candidates

Do you already hold an advanced credential or have extensive finance industry experience? Your credentials and skills allow you to apply for the exam on the Accelerated Path, helping you achieve CFP® certification more quickly than other candidates.

[Learn More »](#)

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

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Review Programs to Prepare You for Exam Success

Complete your journey to becoming a CFP® professional with an industry-leading Exam Prep Review Package. Our review programs break down the curriculum into highly testable topics, making study hours easier to schedule and manage.

[Learn More »](#)

Feature	Premium Review	Essential Review
Review Classes	Choice of Onsite, Live Online or OnDemand Class	N/A
Core Materials & Resources		
CFP® Certification Textbooks (PDFs)	✓	✓
Financial Calculator Videos and Digital Workbook	✓	✓
Pre-Study Assessment	✓	✓
Study Checklists	✓	✓
Summary of Commonly Tested Topics	✓	✓
Video Library	✓	
CFP® Exam Podcasts	✓	
Financial Planning Case Studies	✓	✓
Mock Exam	✓	
InstructorLink™ (Instructor Email Access)	✓	✓
Community	✓	✓
Personalized Study Tools		
Activity Feed	✓	✓
Performance Tracker	✓	✓
Review QBank	✓	✓
AI Tutor	✓	
Other Features		
PassProtection™	✓	

PassProtection™

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[Call For Details](#)



We've 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.

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The College for Financial Planning®—a Kaplan Company does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP (with plaque 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. The College for Financial Planning®—a Kaplan Company is an education and exam prep review provider for the CFP® Certification Examination administered by Certified Financial Planner Board of Standards, Inc. CFP Board does not endorse any education or review course or receive financial remuneration from education or review course providers.

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