

The Financial Plan Development Course Supplemental Information

Course Registration

CFP Board will require submission of all Financial Plan Development Course syllabi and assessment rubrics during the annual Registered Program registration renewal. The purpose of this ongoing evaluation is to ensure that all of the students enrolled in the various Registered Programs across the United States demonstrate the same minimum competency level relative to the Financial Plan Development Course learning objectives.

1. **Course Syllabus**

Evaluation of the course syllabus will depend solely upon the content, instruction, learning experiences, and assessment strategies relative to the learning objectives established as the criteria for the Financial Plan Development Course. If a capstone course has already been part of the curriculum, CFP Board's Registered Program Manager can evaluate the course and assess the gaps, if any, that exist with regard to the current syllabus and the Financial Plan Development Course required criteria.

2. **Curriculum Vitae of the Instructor of the Financial Plan Development Course**

Evaluation of the qualifications of the instructor of this new course will be identical to those found in Section III, (pp. 8-17), *Criteria for Registration of a Financial Planning Curriculum with CFP Board* (April, 2008).

3. **Assessment Rubric** utilized by instructor for the Financial Plan Development Course.

CFP Board requires the use of an assessment rubric in the Financial Plan Development Course. CFP Board-Registered Programs have the freedom to decide the content and weight of components of their assessment rubric relative to learner assessment in components of the financial plan.

Additional Provisions

- CFP Board expects Registered Programs to monitor who has taken the Financial Plan Development Course (FPDC) as well as determine the course of action (new versus old curriculum) for students who have breaks in enrollment.
- A student's status with regard to the Grandfather Clause will not be affected by exam performance.
- Submission for approval of the Financial Plan Development Course will be relative to the syllabus, rubric, and CV for the instructor of the course. Registered Programs can submit their Financial Plan Development Course for approval at any time between July 15, 2010 and December 1, 2011.
- Registered Programs who have not submitted the Financial Plan Development Course for review on or before December 1, 2011 will be de-registered.
- Challengers must complete the Financial Plan Development Course in order to register for the March 2012 exam.



- Registered Programs are encouraged to utilize the terms “Financial Plan Development Course,” “Capstone Course in Financial Planning,” or “Case Studies Course” within their institution.
- Registered Programs are encouraged to require students to take this course at the end of the sequence of curricular courses within their program of study. However, faculty at Registered Programs will monitor and advise when students should take this course in their program of study.
- CFP Board recognizes the oversight and quality control that exists at all of the institutions that house Registered Programs. Therefore, CFP Board will only approve Financial Plan Development Courses that have been previously approved by the institutions that house the Registered Program.