

CERTIFIED FINANCIAL PLANNER
BOARD OF STANDARDS, INC.



2008 | CFP Board's
Annual Firm Meeting



December 5 ■ Westin City Center, Washington, DC

Certification

Carol Lee Roberts, CFP®
Managing Director,
Examination and Education

The Four E's

- Education
 - Registered Programs
 - 340 programs at 212 institutions
 - 4 Ph. D programs
 - 47 graduate programs
 - 90 undergraduate
 - 199 certificate programs

The Four E's

- Education
 - Continuing Education
 - 3,016 Sponsors
 - More than 15,000 programs
 - Almost 500 conferences approved this year alone
 - Processing time of complete applications is now within the service standard

Examination

- Three times a year
 - **10 hours**
 - **285 multiple choice questions**
 - **3 cases and discreet items**

- **November exam had 2, 479 registered**

Experience

- Three years of relevant full time work experience
- Provision, support or direct supervision of any portion of the financial planning process

2008 E and E Initiatives

- Council on Education formed
 - **Members**
 - **Initiatives**
- Continuing Education Task Force
 - **Recommendations**
 - **Implementation**

2008 E and E Initiatives

- Experience Task Force
 - **Recommendations**
 - **Implementation**
- Examination
 - **Score Reporting**
 - **Next Steps**