Registration Criteria for CFP Board Registered Programs
Updated November 2010

The following section contains the financial planning program registration criteria and guidelines. They are designed to be used in encouraging the evaluation of existing programs and to assist in establishing new programs. The intent is to identify issues of special interest to financial planning education and to establish minimum requirements in the form of registration criteria and guidelines.

The guidelines are general indications of the nature and range of issues that should be considered in evaluating an educational program. They provide additional interpretation as to the intent of the registration criteria.

The registration criteria enumerate standards that the financial planning program must meet to become a CFP Board-Registered Program. The criteria represent program expectations; those items that are REQUIRED are presented in this section in ALL UPPERCASE LETTERS.

A. General Criteria

A1. Institutional Accreditation

Applications will be accepted from four-year degree-granting institutions and graduate degree-granting institutions currently accredited by a regional accredited agency recognized by the U.S. Department of Education.

Applications from institutions accredited by a national institutional or specialized accrediting body recognized by the U.S. Department of Education shall be considered on a case-by-case basis. Such institutions must offer four-year degrees and/or graduate degrees, preferably in disciplines related to personal financial planning and must demonstrate compliance with other criteria to the satisfaction of the Director of Education.

Certificate program applications from regionally-accredited institutions that offer two-year degrees shall be considered on a case-by-case basis, subject to proof acceptable to the Director of Education that the institution may offer non-degree programs at the upper division baccalaureate level of higher.

A2. Degree/Certificate Title

The title for educational programs should contain the words “financial planning.” For degree programs, the key words should be found in majors, concentrations, specializations, or other forms of emphasis. THE WORD OR LETTER MARKS OWNED BY CFP BOARD, NAMELY, CFP® AND CERTIFIED FINANCIAL PLANNER™, MAY BE USED IN THE PROGRAM TITLE ONLY WITHIN REQUIREMENTS SPECIFIED BY CFP BOARD AND ONLY AFTER REGISTRATION WITH CFP BOARD IS APPROVED. CFP BOARDS MARK (FIRE) MAY <u>NOT</u> BE USED IN THE PRGORAM TITLE. CFP Board does NOT require use of its marks in the program title.

A2.1 The following three requirements must be met for approval to use CFP Boards word or letter marks in the title of a CFP Board-Registered Program:

a. The program title is represented as one of the following (or a variant that has "CFP® Certification or "CERTIFIED FINANCIAL PLANNER™" as core words):

- CFP® Certification Education Program
- CFP® Certification Professional Education Program
- CFP® Certification Financial Planning Education Program
- CERTIFIED FINANCIAL PLANNER™ Certification Education Program
- CERTIFIED FINANCIAL PLANNER™ Certification Professional Education Program
- CERTIFIED FINANCIAL PLANNER™ Certification Financial Planning Education Program.

b. The word "certificate" is never used in the program title along with "CFP® Certification."

c. The following disclaimer is clearly associated with the program title on all educational certificates provided by CFP Board-Registered Program (in legible font size proportional to the text being used):

> This certificate indicates completion of the educational coursework component of CFP Board's CFP® certification program. To be authorized to use the CFP®, CERTIFIED FINANCIAL PLANNER™, and certification marks, individuals must complete additional examination, experience, ethics and other requirements. The prohibition against using marks owned by CFP Board in the title of the program except as specifically provided is to help ensure proper use of those marks and to avoid confusion as to the source of the courses.

A.2.3 This criterion about program title is intended to ensure that the educational institution has a substantial commitment to personal financial planning, not merely an interest that is peripheral to a related discipline. It also encourages institutions to use nomenclature that is an accurate indicator of the program's emphasis. The degree/certification title identifies the program as being in financial planning. This is also useful to prospective students and employers of the graduates.

In a program where a financial planning major is actually a supplement to a related field, or a general degree, or an option leading to a degree in a related field, it may <u>not</u> qualify for CFP Board registration. To be registered the program must clearly have a substantial and primary focus in financial planning. The official degree/certificate title should reflect this by containing the words "financial planning."

A3. Length of Program

A3.1a Undergraduate Degree Programs

UNDERGRADUATE DEGREE PROGRAMS SHALL BE AT LEAST FOUR YEARS IN DURATION, WITH AT LEAST 15 SEMESTERD CREDITS AT THE UPPER DIVISION IN THE FINANCIAL PLANNING CORE TOPICS

Since the nature of financial planning is interdisciplinary, it is expected that institutions will use their resources in various ways to create financial planning programs. Educational institutions involved at this time at the undergraduate level have developed programs through schools of business, finance, accountancy, or consumer sciences.

The four-year length represents four academic years of full-time study, or the equivalent, as customarily required for a bachelor degree. A list of the financial planning core topics (i.e., the topic list determined by CFP Board’s job analysis study) is included in the application form. Courses covering the topics on that list are expected to be upper division level courses.

Although 15 semester credit hours covering CFP Board topics is the minimum length requirement, universities are encouraged to exceed this. For example, a 21 credit hour curriculum could include seven three-credit courses with titles such as: Financial Planning Process and Fundamentals, Insurance Planning and Employee Benefits, Investment Planning, Income Taxation for Individuals and Businesses, Retirement Planning, Estate Planning and Taxation, and Case Studies in Personal Financial Planning. See the section related to curriculum for further guidance.

A3.1b Master’s Degree Program

MASTER’S DEGREE PROGRAMS SHALL HAVE AT LEAST 15 SEMESTER CREDITS IN THE FINANCIAL PLANNING CORE TOPICS.

The length represents two academic years of full-time study, or the equivalent, as customarily required of a master's degree. A list of the financial planning core topics (i.e., the financial planning topic list determined by CFP Board’s job analysis study) is included in the application form.

A.3.1c Doctoral Degree Programs DOCTORAL DEGREE PROGRAMS WILL VARY IN DURATION, BUT SHALL REQUIRE COURSE WORK IN FINANCIAL PLANNING SUBSTANTIALLY BEYOND THAT REQUIRED FOR A MASTER’S DEGREE PLUS AN INDEPENDENT DISSERTATION OR RESEARCH PROJECT.

A.3.2 Certificate Programs CERTIFICATE PROGRAMS SHALL HAVE AT LEAST 15 UPPER-DIVISION SEMESTER CREDITS, OR EQUIVALENT HOURS, IN THE FINANCIAL PLANNING CORE TOPICS.

Many educational institutions have developed post-graduate certificate programs that focus on the required financial planning core topics (i.e., the financial planning topic list determined by CFP Board’s job analysis study). Program length requirements, level requirements, and so on for certificate programs are the same as for degree programs, whether the certificate program is offered for academic credit or is a not-for-credit program. Those institutions interested should carefully review the detailed financial planning topic list found in CFP Board's *Guide to CFP® Certification* and posted on CFP Board's Web site, www.CFP.net.

In determining semester credit hour equivalency for a not-for-credit program, CFP Board considers that, traditionally, one contact hour per week plus two hours or more of preparation per contact hour, over a 15-week semester, is worth one semester credit hour.

A 3.3 Contact Hours

HOURS OF INSTRUCTION OR INSTRUCTIONAL ACTIVITY THE LEARNER RECEIVES FROM THE PROGRAM. INSTRUCTIONAL ACTIVITY INCLUDES ANY PROGRAM-SPONSORED ACTIVITY DESIGNED TO PROMOTE STUDENT LEARNING IN THE PROGRAM CURRICULUM SUCH AS CLASSROOM INSTRUCTION, ASSESSMENT, TUTORING, OR PARTICIPATION IN A LEARNING LAB. Note: Time spent on assessment can be counted **only** if the assessment is designed to inform placement decisions, assess progress or inform instruction.

Contact Hours for Online Learning

CONTACT HOURS FOR DISTANCE LEARNERS CAN BE A COMBINATION OF ACTUAL CONTACT AND CONTACT THROUGH TELEPHONE, VIDEO, TELECONFERENCE, OR ONLINE COMMUNICATION, WHERE STUDENT AND PROGRAM STAFF CAN INTERACT AND THROUGH WHICH LEARNER IDENTITY IS VERIFIABLE

Examples of Contact Hours

- Presentation of new material via classroom/online instruction, recitation, tutorial, supervised activity, supervised experiential instructional activity, or supervised independent study.

- Lab setting where the learner interacts with course content to meet a pre-determined achievement objective with instructor guidance, input, guided reflection/ assessment, e. g.- practicum, case study, group analysis, etc.

- Formal assessment- written or oral exam that measures learner achievement. Formal assessments consist of data that supports the conclusions made from the exam, such as percentiles, stanines, standard scores.
  - Note: *Formal Assessments or standardized measures are used to assess overall learner achievement, while comparing that achievement level with learners at the same skill/educational level. In order to fall into the caption of a contact hour, a formal assessment must be utilized*

diagnostically in identifying the learner's strengths and weaknesses, informing instruction and subsequent learner placement.

- Informal assessment- content and performance driven (percentages, rubrics).
    - A monitored classroom/online discussion forum related to course content
    - A questionnaire based off of a classroom or online lecture
        - Note: ***Informal Assessments*** *(performance-based measures) are utilized to inform instruction, enabling the instructor to make decisions relative to the pace and sequence of instruction.*

CFP Board accepts course credit hour recommendations (number of hours and level) made by the American Council on Education (ACE). CFP Board does not require that certificate program courses be reviewed by ACE, but encourages not-for-credit certificate programs to consider an ACE evaluation.

B. Degree/Certificate Objectives

B.1 Statement of Objectives

B.1.1 A STATEMENT OF OBJECTIVES SHALL BE DEVELOPED FOR EACH FINANCIAL PLANNING DEGREE OR CERTIFICATE PROGRAM.

The statement should be realistic and explicit, reflecting the program's abilities, aspirations, and its response to the needs of students and society. The objectives should represent a variety of commitments for the financial planning program. They become a key set of self-imposed criteria for degree or certificate program evaluation, and should involve a conscious effort to reflect the goals of the institution, program, faculty, students, and financial planning profession.

CFP Board will use the statement of objectives as a basic point of reference in evaluating applications for registration. In addition to considering specific criteria set forth below, CFP Board will expect the resources of the institution and the program to be adequate to support the stated objectives. It is anticipated that the content of the program objectives will change from time to time. CFP Board will not impose any preconceived norm or model. However, program objectives should respond to public needs and be compatible with CFP Board purposes.

B.1.2 A DESCRIPTION OF THE METHODS USED TO FORMULATE OBJECTIVES SHALL BE PROVIDED.

This statement should include a description of the process, and indicate who was involved in goal development (i.e., administration, faculty, students, community, CFP® certificants, other professionals in the field of financial planning, etc.). In addition, comment should be provided on the extent of involvement for each participant category.

C. Curriculum

C1. Course Content

AT A MINIMUM, THE CURRICULUM SHALL CONTAIN COURSES THAT ENABLE THE STUDENT TO ACQUIRE AN UNDERSTANDING OF THE TOPICS FOUND IN CFP BOARD'S FINANCIAL PLANNING TOPIC LIST.

The purpose of the topic list is to guide educational institutions to develop degree and certificate programs in financial planning that deal with the skills and knowledge deemed important to the tasks involved in comprehensive financial planning. The required topic coverage and the recommended optional courses described herein were formulated based on CFP Board's job analysis study of the practice of financial planning. The periodic updates of the job analysis study practice will result in modifications to the curriculum guidelines from time to time, approximately every five years. Topic coverage adequacy will be determined by CFP Board's review of detailed course syllabi, textbooks, student evaluation methods, faculty credentials, and other relevant materials. Throughout the registration period, course materials should be kept up-to-date and reflect current law and practice.

C2. Academic level

AT A MINIMUM, THESE COURSES MUST BE TAUGHT AT AN UPPER DIVISION BACCALAUREATE LEVEL.

For degree courses from a regionally accredited institution, the course level assigned by the institution will be accepted. For all not-for-credit certificate programs and other applicants, CFP Board's review of detailed course syllabi, textbooks, student evaluation methods, faculty credentials, and other relevant materials and factors will determine course level adequacy. Course credit recommendations (course level and credit hours) of the American Council on Education (ACE) will be accepted. Although CFP Board does not require that such courses be reviewed by ACE, it encourages not-for-credit programs to consider evaluation by ACE.

C3. Recommended General Education and Elective Courses

In addition to the core curriculum, institutions are encouraged to include the following courses: communication skills, mathematics, ethics, humanities, and social sciences. Upper-division courses that explore counseling issues and skills (such as values clarification, goal-setting, modifying financial behavior), attitudes towards money (fears, risk tolerance), consumer investment and savings decisions, family and human relationships, statistics and decision-making sciences are encouraged. Courses in basic psychology and sociology should be taken as a part of the general education requirement.

C4. Recommended Financial Planning Prerequisites

Certificate programs, undergraduate, and master's programs should consider the following list of courses as prerequisites or graduation requirements:

- Financial accounting
- Macro- and micro-economics
- Quantitative analysis
- Finance
- Business law
- Business ethics
- Computer science: financial applications
- Counseling skills

C5. Courses in Program, Textbooks, Grading, Faculty Assigned to Courses

A LIST, DESCRIPTION, AND DETAILED SYLLABUS (COURSE OUTLINE) OF ALL FINANCIAL PLANNING PROGRAM COURSES SHALL BE PROVIDED IN THE APPLICATION. TEXTBOOKS MUST BE IDENTIFIED FOR EACH COURSE. METHODS OF GRADING STUDENT MASTERY MUST BE IDENTIFIED. FACULTY RESPONSIBLE FOR TEACHING EACH COURSE MUST BE IDENTIFIED.

Generally, courses will be those taught by the financial planning faculty and available to financial planning students, or serve as electives to students in related disciplines. Typical course names may include:

- Fundamentals of Financial Planning; Survey of Personal Financial Planning
- Insurance Planning and Risk Management
- Investment Planning
- Securities Analysis and Asset Allocation
- Personal Income Tax Planning; Taxation of Individuals and Businesses
- Retirement Planning
- Employee Benefits Planning
- Estate Planning and Taxation
- Financial Planning Case Studies Capstone Course; Practicum
- Financial Planning Internship

Universities are expected to require use of standard textbooks in each major category on CFP Board’s topic list. “Exam prep” or Review Course materials are not substitutes for textbooks that provide theoretical and practical approaches to the topics.

C6. Financial Plan Development Course (Capstone)

The criteria for the content of the Financial Plan Development Course consist solely upon the seven CFP Board required learning outcomes.

Learning Objectives
Upon completion of this course, the student will be able to:

1. Demonstrate a comprehensive understanding of the content found within the Financial Planning curriculum and effectively apply and integrate this information in the formulation of a financial plan.

2. Effectively communicate the financial plan, both orally and in writing, including information based on research, peer, colleague or simulated client interaction and/or results emanating from synthesis of material.

3. Collect all necessary and relevant qualitative and quantitative information required to develop a financial plan.

4. Analyze personal financial situations, evaluating clients’ objectives, needs, and values to develop an appropriate strategy within the financial plan.

5. Demonstrate logic and reasoning to identify the strengths and weaknesses of various approaches to a specific problem.

6. Evaluate the impact of economic, political, and regulatory issues with regard to the financial plan.

7. Apply the CFP Board Financial Planning Practice Standards to the financial planning process.

Capstone Course Learning Experiences

In developing curriculum and instruction relative to the Financial Plan Development Course, Registered Programs have the flexibility to utilize a variety of educational experiences in order to meet the specified learning objectives required by CFP Board. These experiences within this capstone course may include, but are not limited to, case studies, practicum experiences, presentation formats, software, and internships. The rationale for devising criteria focused exclusively upon learning objectives is to give Registered Programs the opportunity to use their own creativity in devising learning experiences that they believe are best suited for their students, while still meeting the CFP Board required learner achievement benchmarks relative to the financial plan development course.

Assessment

CFP Board will require that Registered Programs utilize rubrics as a primary avenue of learner assessment in the Financial Plan Development Course. However, CFP Board encourages faculty in Registered Programs to develop their own assessment rubrics that represent what they believe to be the primary components of a particular course or unit of study. These rubrics should accurately assess all aspects of the content and experiences associated with the Financial Plan Development Course Learning Objectives. 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.

Grandfather Clause

The “Grandfather” Clause provides protection from changes in requirements for students who maintain continuous enrollment in a program of study, curriculum, or major. The Financial Plan Development Course is required for all students enrolled in a certificate, baccalaureate, or graduate program effective January 1, 2012. Therefore, students whose initial date of matriculation occurs on or after January 1, 2012 will be required to take this course. Conversely, a student whose initial date of matriculation is before January 1, 2012, but is still enrolled in the Registered Program, will not be required to take the Financial Plan Development Course. Registered programs will decide the appropriate program of study for students who have a significant break in enrollment during any point in this period. It is important to note that given the upcoming changes to the CFP® exam, Registered Programs should encourage all students to consider enrollment in the Financial Plan Development Course once it is adopted by the institution.

C7. Learning Experiences

Learning experiences outside the classroom are of particular importance in planning. They provide exposure to independent problem solving, research, and financial planning in a real work context. Educators are encouraged to include internships, case practice, cooperative experiences, special projects, team projects, and the like into the program.

Each course focused on CFP Board’s financial planning topic list should include case studies in personal financial planning situations appropriate to the course subject matter to develop the student’s ability to use critical-thinking, problem-solving, and decision-making skills in the context of personal financial planning process.

C8. Synthesizing Elements of Comprehensive Financial Planning
At least one course in the program should attempt to synthesize basic elements of comprehensive financial planning. This should provide knowledge of how the planning process is made operative in a variety of contexts. A collection of courses is not necessarily adequate to accomplish this goal. The sequence of courses and the kinds of real world problems used for teaching purposes are important influencing factors.

D. Faculty

D1. Faculty Quality

D1.1 THE QUALIFICATIONS OF THOSE RESPONSIBLE FOR TEACHING EACH COURSE AND OTHER COMPONENTS OF A CFP BOARD-REGISTERED PROGRAM SHALL BE APPROPRIATE TO THEIR PARTICULAR RESPONSIBILITIES AND ROLES WITHIN THAT PROGRAM, PARTICULARLY AT THE UPPER DIVISION BACCALAUREATE AND GRADUATE LEVEL.

A CURRICULUM VITA FOR EACH FACULTY MEMBER SHALL BE PROVIDED REFLECTING HIS OR HER QUALIFICATIONS AND RESPONSIBILITIES. If certain faculty positions are open at the time the application or renewal application is submitted to CFP Board, the application shall state the standards to be used by the institution in selecting faculty to teach in the program. The application also shall affirm that current curriculum vitae will be sent to CFP Board as additional faculty members are hired.

While faculty numbers may be adequate, individuals may be ill equipped or inappropriately qualified for their respective teaching responsibilities. On the other hand, individuals with appropriate backgrounds should teach courses. For example, someone with graduate training in economics or with comparable research or consulting experience should teach a course in economic analysis. Because of course level requirements, all faculty members should have appropriate graduate degrees. In lieu of having an appropriate graduate degree, faculty may hold a current CFP® certification plus a bachelor's degree in a related field, or a current CFP® certification, a bachelor's degree, and significant experience related to the course content. Faculty members who are authorized to use the CFP® marks are encouraged to do so. In rare instances where a faculty member in a certificate program does not have an appropriate graduate degree or a current CFP® certification and a bachelor's degree, an academic officer of the institution shall provide a letter stating that the individual is considered qualified by that institution to teach the course at the upper division baccalaureate level (or higher). In no event will a faculty member be deemed appropriate who does not have at least a bachelor's degree.

D2. Accessibility to Students

D2.1 Institutions are encouraged to make the faculty highly accessible to students, both in and out of the classroom.

D3 Research and Professional Involvement

D3.1 The involvement of faculty in research related to personal financial planning is encouraged. Academic research can make an important contribution to the evolution of the profession and its ability to serve society. It also provides opportunities for intellectual enrichment to participating faculty and students.

D3.2 The involvement of faculty in academic and professional organizations related to personal financial planning is encouraged. Examples of such organizations are the Academy of Financial Services (AFS) and the Financial Planning Association (FPA). Involvement in related academic and professional organizations can provide faculty with opportunities to enhance their teaching techniques and can help faculty ensure that approaches and hypothetical cases used in the classroom are appropriate to the practice personal financial planning by individuals with the CFP® certification.

D4. Program Head (Program Director)-Professional Qualifications THE HEAD OF THE FINANCIAL PLANNING PROGRAM WHO IS DESIGNATED AS THE PROGRAM DIRECTOR MUST HAVE ONE OR MORE OF THE FOLLOWING QUALIFICATIONS:

- BE A CFP® CERTIFICANT OR BE ABLE TO QUALIFY TO SIT FOR CFP BOARD'S CFP® CERTIFICATION EXAMINATION (i.e., he or she must hold a designation, license, or degree that would qualify under CFP Board's "Challenge Status" to sit for the CFP® Certification Examination)
- HAVE GRADUATE EDUCATION IN FINANCIAL PLANNING OR A RELATED DISCIPLINE FROM A COLLEGE OR UNIVERSITY CURRENTLY ACCREDITED BY ONE OF THE SIX REGIONAL ACCREDITATION AGENCIES; or
- FOR A NON-DEGREE CERTIFICATE PROGRAM, HAVE A GRADUATE DEGREE RELATED TO EDUCATION, ADULT EDUCATION, OR BE THE HEAD OF THE CONTINUING PROFESSIONAL EDUCATION DEPARTMENT OF THE COLLEGE OR UNIVERSITY.

Just as faculty are encouraged to participate in academic and professional organizations related to personal financial planning, Program Directors are strongly encouraged to participate in such academic and professional groups. In addition to the rationale for faculty participation, such participation by a Program Director also provides opportunities to meet individuals who may serve the program in an advisory capacity.

D5. Program Directors Conference

Program Directors are expected to attend CFP Board's annual Program Directors Conference, which is generally held over the first weekend in August and to facilitate attendance by at least one faculty member, when faculty is also included. If a Program Contact other than the Program Director is appointed to handle administrative matters and to be an additional liaison with CFP Board, the Program Director should also facilitate attendance by the Program Contact. In the event the Program Director and Program Contact cannot personally attend, a substitute (generally a faculty member) should attend.

Administrative and/or departmental budgets are expected to include sufficient funds for such attendance.

D6. Collegiality

Directors, administrators, and faculty of CFP Board-Registered Programs are expected to develop professional relationships with their peers at other colleges and universities, and to encourage collegiality with peers at other CFP Board-Registered Programs among faculty and administrators. From time to time CFP Board may share names of Directors and Contacts at CFP Board-Registered Programs with faculty and administration at colleges and universities that are considering registering a financial planning curriculum with CFP Board.

E. Students

E1. Admission Policy

CERTIFICATE PROGRAMS MUST INCLUDE A COPY OF THE INSTITUTION'S PUBLISHED STATEMENT OF PROGRAM ENTRY REQUIREMENTS FOR THE FINANCIAL PLANNING PROGRAM

Careful consideration should be given to the standards for admission and the composition of the student population in both degree and certificate programs. High admission standards will tend to foster high academic performance. They may be paramount in creating a quality program.

Students recruiting and admission policies should be in harmony with the program objectives and capabilities. Thus, students should be considered for admission, not only on the basis of prior academic work, but also in light of the compatibility of their personal goals with the program objectives. Contributions that the student may make to the program and the profession should also be considered.

Any policy that allows the entry of students who would not meet traditional admission standards should be undertaken only after careful consideration of special education programs that can be supported along with the regular programs. The absence of such programs may result in the unfortunate choice between lower academic performance standards or a high rate of failure.

E2. Nondiscrimination Policy

ADMISSION AND OTHER PROGRAM STANDARDS SHOULD NOT DISCRIMINATE ON THE BASIS OF RACE, COLOR, RELIGION, SEX, NATIONAL ORIGIN, AGE, DISABILITY, OR ANY OTHER CHARACTERISTIC PROTECTED BY LAW.

F. Other Resources

F1. Library

A good library is critical to a successful financial planning education program. The book collection should be substantial, covering not only financial planning topics, but also closely related disciplines. Academic journals in the field of personal financial planning, such as *Financial Services Review*, and related disciplines should be included in the library collection.

Acquisition budgets and procedures should reflect the dynamic nature of the field. Faculty input into acquisitions decisions should be solicited.

F2. Student Organizations

Collegiality among students and faculty advisors, service to the community and school, opportunities to network with financial planning professionals, leadership opportunities, teamwork, and enrichment activities can be fostered through an active student organization for financial planning program students. Accordingly, CFP Board encourages formation and fostering of student financial planning organizations, with participation and affiliation with national financial planning organizations, such as Financial Planning Association (FPA) or other membership organizations, as appropriate.

F3. Continuing Education Programs

Well-established financial planning programs can offer continuing education courses to meet the needs of professionals. These matters are sufficiently important to merit the same competence and prestige associated with degree related instruction. Institutions offering continuing education in subjects covered by CFP Board's topic list are encouraged to contact CFP Board to become a listed continuing education sponsor.

F4. Alumni

Schools should maintain contact with their graduates. The ability of graduates to occupy positions of responsibility in professional practice is an important indicator of an adequate program. In addition, graduates often can make very helpful suggestions for improving the educational program, and assist with job placement.