



Volunteer Registration Form

Thank you for your interest in volunteering with CFP Board. In order to obtain quality volunteers, CFP Board must collect personal information from you. CFP Board will conduct a background check on each applicant under consideration. The extent of this check will depend upon the type of opportunity you are registering for and may include various state and federal searches. If you choose not to provide this information, CFP Board cannot process your form. Your submission of the registration form is verification of your acceptance of these terms. Unless otherwise stated in our Collection and Dissemination of Information Policy statement, personal information provided by you will not be used for marketing and promotional purposes by CFP Board, however, CFP Board may disclose personal information in response to a subpoena or when we believe in good faith that the law requires it or to respond to an emergency situation.

SECTION I: Contact Information

Name: _____ **Email:** _____

Business Name: _____ **Job Title:** _____

Business Address: _____ **Date Started with Company:** _____

_____ **Home Address:** _____

Phone: _____

Fax: _____

SECTION II: Other Volunteer Opportunities

Mark all opportunities for which you are interested in volunteering:

- Council on Education
 - Council on Examinations
 - Disciplinary and Ethics Commission
 - Public Outreach Speakers
- Exam Development Volunteers:**
- Job Analysis
 - Exam Content Specialists
 - Item or Case Writers
 - Paired Review
 - Field Tester

Specialized registration forms are available for those interested in serving on CFP Board's **Board of Directors** or **Public Policy Council**. To request a form for these volunteer opportunities, please contact CFP Board at 800-487-1497 or volunteer@cfpboard.org.

SECTION III: Educational Degrees

Degree: _____ Date Received: _____ College or Institution: _____

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SECTION IV: Professional Designations

Designation: _____ Date Received: _____ Granting Organization: _____

Designation: _____ Date Received: _____ Granting Organization: _____

Designation: _____ Date Received: _____ Granting Organization: _____

SECTION V: Licenses Held

Have you ever had a license relinquished or revoked? Yes No If 'yes,' please explain in the space below or on an attached sheet.

SECTION VI: Previous Volunteer Service

Please list previous CFP Board service or positions held, if any, and other relevant professional association/industry/community service:

Service/Position: _____ Start date: _____ End date: _____
References: _____

Service/Position: _____ Start date: _____ End date: _____
References: _____

SECTION VII: Background and Qualifications

Clearly describe areas of particular national or international leadership or prominence in your background:

Please state briefly your specific or unique qualifications to serve generally and the contributions you hope to make to CFP Board and its purposes. If applying for public outreach speaking opportunities, please provide a list of topics you are most comfortable with and a short list of prior speaking engagements.

Subject Matter Expertise:

- Generalist
- Insurance Planning
- Employee Benefits
- Tax Planning
- Retirement Planning
- Estate Planning

SECTION VIII: Disclosure of Complaints Current and Past

Are you, or have you ever been, under notice as to any complaints by clients or any regulatory agency which have led or may lead to legal or disciplinary action?

- Currently
- Have Been
- No

If you are currently under notice or you have been in the past, please briefly explain:

SECTION IX: Acknowledgement and Submittal

I agree that everything on and attached to this form is correct and accurate to the best of my knowledge.

Signature: _____ **Date:** _____

Please attach your resume to this form and send to CFP Board by mail to 1425 K Street NW #500, Washington, DC, 20005 or by fax to 202-379-2299.

We appreciate your interest in serving with CFP Board and look forward to reviewing your application. If you have questions, please contact CFP Board at 800-487-1497 or volunteer@cfpboard.org.