

CERTIFIED FINANCIAL PLANNER
BOARD OF STANDARDS, INC.

YOUR CAREER AS A
CERTIFIED FINANCIAL
PLANNER™ PRACTITIONER



CERTIFIED FINANCIAL PLANNER™

CFP®

Certified Financial Planner Board of Standards Inc. owns these certification marks in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Your career in financial planning will be filled with opportunities and challenges. Many Americans are now responsible for their own financial future and are looking to professional advisers for assistance. The *2001 Jobs Rated Almanac's* choice of financial planner as the number one career in America has awakened people to the benefits of this rapidly growing profession.

The public is too often confused about how to select a financial planner. As increasing numbers of people in financial services call themselves "financial advisers," financial planning professionals need a way to differentiate themselves and demonstrate quickly that they are competent and capable. That differentiator is the CERTIFIED FINANCIAL PLANNER™ certification awarded by Certified Financial Planner Board of Standards Inc., and more than 55,000 professionals in the U.S. already set themselves apart in this meaningful way.

It's your future. Plan it!SM




Why Become a CERTIFIED FINANCIAL PLANNER™ Practitioner?

Why has the CERTIFIED FINANCIAL PLANNER™ certification become so sought after by consumers and the financial planners who serve them? The answer is simple. The public is looking for a planner who has demonstrated a commitment to competency, and financial professionals want an established certification that sets them apart in a globally expanding financial planning profession. CFP Board research shows consumers increasingly rely on credentials when selecting a financial adviser.

As a CERTIFIED FINANCIAL PLANNER™ practitioner, you can energize or revitalize your career, whether as an entrepreneur or in a large firm, by leveraging the knowledge and prestige associated with the world's most recognized financial planning certification. You will be equipped to provide truly personalized services to clients and maintain high levels of financial planning professionalism and expertise.

The Benefits of CFP® Certification

The CFP®, CERTIFIED FINANCIAL PLANNER™ and  certification marks are the most recognized financial planning marks in the world. Unlike an educational designation offered by a college or university, CFP® certification is based on independently established public interest standards. As a result, it prepares you for a career-long commitment to meeting the ever-changing needs of your clients. Examples of the benefits of CFP® certification include:

☐ Your Expertise and Credibility as a Financial Planner is Instantly Communicated.

Only a select group of planners have met the rigorous education, examination, experience and ethics requirements necessary to call themselves CERTIFIED FINANCIAL PLANNER™ professionals or CFP® practitioners. CFP® certification communicates your expertise and credibility among your peers, and consumers view CFP® certification as an indication of a qualified, trustworthy financial planner.





❑ **Your Career and Professional Development**

Opportunities Are Enhanced.

Increasingly, large financial services firms make CFP® certification part of their hiring requirements for financial planning divisions, while other firms reward attainment and retention of the certification with career and salary enhancements. Whether you are in a large or small firm setting, CFP® certification provides the advantage of easily communicating expertise to clients and supervisors and opening career opportunities. The international appeal of CFP® certification helps ensure that your career will not get derailed should you choose to work in another country.

❑ **You Become a Coach and a Problem Solver.**

Financial planning is a six-step process you go through when counseling clients. CERTIFIED FINANCIAL PLANNER™ practitioners use the process in a flexible manner, consistent with being a valued professional adviser who must deal with unique and often challenging client situations. As a CFP® practitioner, you will help clients discover and solve financial problems and achieve life goals by serving as both counselor and coach. As you gain more experience, you can also mentor those entering the profession, helping guide the next generation of CFP® practitioners.

❑ **Your Clients Are More Satisfied.**

CFP® Board research shows that clients of CFP® practitioners are more satisfied than the clients of other financial advisers and are interested in a broader range of financial advice. CFP® practitioners often become involved with many aspects of their clients' lives and help multiple generations of the same family. Most CFP® practitioners use a comprehensive approach to problem solving and communication that better prepares them to meet and anticipate client needs. Because CFP® practitioners make recommendations based on their clients' needs, the typical client relationship for a CFP® practitioner lasts many years.

❑ **Your Earnings Reflect Your Personal Status.**

The amount of income you make as a CFP® practitioner will vary based on your level of experience, areas of specialization and geographic location. As in any of the established professions, a certain level of competence and experience is expected and financially rewarded by users of professional services. CFP® certification instantly establishes your expertise in financial planning among consumers and supports your professional status among your peers.



☐ You Have Tested Yourself Against the Best, and Met the Challenge.

While many may choose to call themselves “financial planners” with little preparation or ability, you will have the satisfaction of knowing that you have proven yourself among the most knowledgeable and capable financial planners in the world. By completing the CFP® certification process, you become part of an international financial planning community committed to putting clients’ interests first and meeting the profession’s highest standards.

What it Means to be a CERTIFIED FINANCIAL PLANNER™ Practitioner

If you are interested in being part of a profession that helps people gain control over their lives and their futures; if you are a big picture thinker and a good listener; and if you are looking for a career filled with opportunities and challenges – then choosing to become a CERTIFIED FINANCIAL PLANNER™ practitioner is the career for you.

Whether you are already a financial planner or have recently decided to enter the profession, going the extra step and obtaining CFP® certification will identify you as a true professional in one of the fastest growing and exciting careers today.

Request Information on CFP® Certification

CFP Board's CFP® certification process consists of four initial requirements in the areas of Education, Examination, Experience and Ethics (known as "the four Es"). Once you have successfully met the requirements and completed the initial certification process, you will need to meet ongoing education and disclosure requirements to maintain CFP® certification.

To learn more about becoming a CERTIFIED FINANCIAL PLANNER™ practitioner, contact CFP Board by phone or online to request a comprehensive Guide to CFP® Certification.

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