
Text References

The following sources are provided as examples of the kinds of publications that candidates may choose to use to prepare for the CFP® Certification Examination. Refer to the latest edition of each publication. No single publication will provide adequate preparation, and some listed provide survey level information only.

Alexander, Sharpe, and Bailey. *Fundamentals of Investments*. Prentice Hall, Englewood Cliffs, NJ.

Allen, Melone, Rosenbloom, and Vanderhei. *Pension Planning: Pensions, Profit-Sharing and other Deferred Compensation Plans*. McGraw-Hill, New York, NY.

All About Medicare. National Underwriter Co., Cincinnati, OH

Baldwin. *The New Life Insurance Investment Advisor*. Irwin Professional Publishing, Chicago, IL.

Beam. *Employee Benefits*. Dearborn Publishing, Chicago, IL.

Beam. *Group Benefits: Basic Concepts and Alternatives*. The American College, Bryn Mawr, PA.

Black and Skipper. *Life Insurance*. Prentice Hall, Englewood Cliffs, NJ.

Bodie, Kane, and Marcus. *Essentials of Investments*. McGraw-Hill, New York, NY.

Bodie, Kane, and Marcus. *Investments*. McGraw-Hill, New York, NY.

Bost. *Estate Planning and Taxation*. Kendall/Hunt, Dubuque, IA.

Canan. *Qualified Retirement and Other Benefit Plans*. West Group, St. Paul, MN.

CFP Board's Standards of Professional Conduct. Certified Financial Planner Board of Standards, Inc., Denver, CO.

Commerce Clearing House. *Federal Estate and Gift Taxes Explained*. Chicago, IL.

Commerce Clearing House. *Master Tax Guide*. Chicago, IL.

Commerce Clearing House. *US Master Pension Guide*. Chicago, IL.

Cordell, editor. *Fundamentals of Financial Planning*. The American College, Bryn Mawr, PA.

Dorfman. *Introduction to Risk Management and Insurance*. Prentice Hall, Englewood Cliffs, NJ.

Dalton, Dalton, and Fisher. *Personal Financial Planning Cases and Applications*. Dalton Publications, St. Rose, LA.

Dalton. *Personal Financial Planning: Theory and Practice*. Dalton Publications, LLC, St. Rose, LA.

Donohue. *An Introduction to Cashflow Analysis*. The Regent School Press, Mission Viejo, CA.

Ellis. *Winning the Loser Games: Timeless Strategies for Successful Investing*. (formerly called *Investment Policy: How to Win the Loser's Game*) McGraw-Hill, New York, NY.

Evensky. *Wealth Management: The Financial Advisor's Guide to Investing and Managing Client Assets*. McGraw-Hill, New York, NY.

Federal Tax Handbook. The Research Institute of America, New York, NY. (annual)

Fowler, Mears, and Rattiner, editors. *Personal Financial Planning Portfolios*. Hartcourt Brace Professional Publishing New York, NY. [Individual portfolios]

Floyd and Allen. *Real Estate Principles*. Real Estate Education Co., Dearborn Financial Publishing, Chicago, IL.

Fontaine, editor. *Fundamentals of Estate Planning*. The American College, Bryn Mawr, PA.

Garman and Forgue. *Personal Finance*. Houghton Mifflin Co., Boston, MA.

Garman and Xiao. *The Mathematics of Personal Finance*. Dame Publications, Houston, TX.

Gibson. *Asset Allocation: Balancing Financial Risk*. Irwin Professional Publishing, McGraw-Hill, New York, NY.

Gitman and Joehnk. *Fundamentals of Investing*. Harper Collins College Publishers, New York, NY.

Gitman and Joehnk. *Personal Financial Planning*. Dryden Press, Orlando, FL.

Gitman. *Principles of Managerial Finance*. Harper Collins, New York, NY.

Graves, editor. *McGill's Life Insurance*. The American College, Bryn Mawr, PA.

Hallman and Rosenbloom. *Personal Financial Planning*. McGraw-Hill, New York, NY.

Henkel. *Estate Planning and Wealth Preservation*. Warren, Gorham & Lamont of the RIA Group, Boston, MA. (student edition available)

Hirt and Block. *Fundamentals of Investment Management*. Irwin/McGraw-Hill, New York, NY.

Ho, Perdue, and Robinson. *Personal Financial Planning (US edition)*. Captus Press, North York, Ontario, Canada.

Hoffman, Smith, and Willis. *West's Federal Taxation, Individual Income Taxes*. West Publishing Co., St. Paul, MN. (annual)

Jones. *Investments Analysis and Management*. John Wiley & Sons, New York, NY.

Jones. *Principles of Taxation for Business and Investment Planning*. Irwin/McGraw-Hill, Boston, MA. (This book is the successor to *Federal Taxes and Management Decisions* which is no longer being updated.)

Kapoor, Dlabay, and Hughes. *Personal Finance*. Irwin/McGraw-Hill, Boston, MA.

Keown. *Personal Finance: Turning Money Into Wealth*. Prentice Hall, Upper Saddle River, NJ.

Kess and Westlin. *CCH Financial and Estate Planning Guide*. Commerce Clearing House, Chicago, IL.

Kolb. *Investments*. Kolb Publishing Company, Boulder, CO.

Krass. *The Pension Answer Book*. Panel Publishers, Inc., New York, NY.

Kurlowicz. *Estate Planning Applications*. The American College, Bryn Mawr, PA.

Lehman. *Irwin Guide to Using the Wall Street Journal*. McGraw-Hill, New York, NY.

Leimberg, Satinsky, LeClair, and Doyle. *The Tools & Techniques of Financial Planning*. National Underwriter Co., Cincinnati, OH.

Leimberg, Kasner, Kendell, Miller, Rosenbloom, and Levy. *The Tools & Techniques of Estate Planning*. National Underwriter Co., Cincinnati, OH.

Leimberg and Doyle. *The Tools & Techniques of Life Insurance Planning*. National Underwriter Co., Cincinnati, OH.

Leimberg and McFadden. *The Tools and Techniques of Employee Benefit & Retirement Planning*. National Underwriter Co., Cincinnati, OH.

Littell, Tacchino, and Cordell. *Financial Decision Making at Retirement*. The American College, Bryn Mawr, PA.

Lochray. *Financial Planner's Guide to Estate Planning*. Prentice-Hall, Englewood Cliffs, NJ.

Maisel. *Real Estate Finance*. The Dryden Press, Orlando, FL.

Mayo. *Investments: An Introduction*. The Dryden Press, Orlando, FL.

Mittra, with Rattiner. *Practicing Financial Planning*. Mittra & Associates, Rochester Hills, MI.

Pond. *Personal Financial Planning Handbook*. Warren, Gorham & Lamont, Boston, MA.

Pring. *Introduction to Technical Analysis*. McGraw-Hill, New York, NY.

Pritchett, Schmit, Doerpinghas, and Athearn. *Risk Management and Insurance*. West Publishing Co., St. Paul, MN.

Ramaglia and MacDonald. *Personal Finance: Tools for Decision Making*. South-Western College Publishing, an International Thomson Publishing Company, Cincinnati, OH.

RIA Federal Tax Handbook. Research Institute of America, RIA Group. (annual)

Reilly and Brown. *Investment Analysis & Portfolio Management*. The Dryden Press, Orlando, FL.

Reilly and Norton. *Investments*. The Dryden Press, Orlando, FL.

Rejda. *Principles of Risk Management and Insurance*. Addison, Westly, Longman, New York, NY.

Ross, Westerfield, and Jordan. *Essentials of Corporate Finance*. Irwin/McGraw-Hill, Boston, MA.

Samuelson and Nordhaus. *Economics*. Irwin/McGraw-Hill, Inc., New York, NY.

Sharpe, Alexander and Baily. *Investments*. Prentice-Hall, Englewood Cliffs, NJ.

Social Security Manual. National Underwriter Co., Cincinnati, OH.

Strong. *Practical Investment Management*. South-Western College Publishing, an International Thomson Publishing Company, Cincinnati, OH.

Tacchino, Beam, and Littell. *Planning for Retirement Needs*. The American College, Bryn Mawr, PA.

Tax Facts 1. National Underwriter Co., Cincinnati, OH. (annual)

Tax Facts 2. National Underwriter Co., Cincinnati, OH. (annual)

Treichsmann and Gustavson. *Risk Management and Insurance*. South-Western Publishing Co., Cincinnati, OH.

Vaughn. *Fundamentals of Risk and Insurance*. John Wiley & Sons, Inc., New York, NY.

Vessenes. *Protecting Your Practice*. IAFP., Atlanta, GA.

Wolf. *Personal Financial Planning*. Custom Publishing, Needham, MA.

Wurtzback and Miles. *Modern Real Estate*. John Wiley & Sons, Inc., New York, NY

Zaritsky and Leimberg. *Tax Planning and Life Insurance*. Warren Gorham & Lamont, Boston, MA.

Winger and Frasca. *Personal Finance: An Integrated Planning Approach*. Prentice Hall Business Publishing, Englewood Cliffs, NJ.