

HOW TO PAY FOR CFP® CERTIFICATION

HERE'S WHAT OTHERS HAVE DONE!

Achieving CFP® certification is an important investment in your future. Here are the most common ways your peers have covered the costs of the education coursework, exam prep, and certification fees:

1

EMPLOYER ASSISTANCE

(FULL OR PARTIAL)

Many companies offer full or partial financial assistance for CFP® certification. This can include paying for education coursework, exam prep and even certification fees. They may require you to work for them for a certain period of time before you qualify, so be sure to ask for the details of your firm's policy.

"My company paid for me to get my CFP® certification. They viewed it as investing in me."

- Emily

2

EMPLOYER REIMBURSEMENT

(FULL OR PARTIAL)

If your company doesn't cover upfront costs, ask if they will reimburse you after you become a CFP® professional. Some employers will refund your costs after you pass the CFP® exam or finish earning certification.

"It is standard at our firm to care deeply about career development. I was told ahead of time that it would be covered so I was able to submit all expenses to be reimbursed."

- Tyler

3

SCHOLARSHIPS, DISCOUNTS & GRANTS

While less common, some professionals have found scholarships or firm-specific grants to help cover costs. You can find a list of scholarships from CFP Board's partners at [CFP.net/scholarships](https://www.cfp.net/scholarships), but be sure to check with your employer to see if they offer continuing education scholarships or other grants.

"As a career changer, I was responsible for the costs myself. However, I sought assistance with the education program and test prep fees. I applied to five scholarships through CFP Board and was awarded one."

- Arianne

4

SELF-FUNDING

Especially if they're planning to transition into the financial planning profession and don't currently work for a financial firm, many CFP® professionals choose to pay for their certification out of pocket.

"I took on the costs myself, considering it an investment in my future that will generate a greater return."

- Marcus



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THIS IS YOUR FUTURE WE'RE TALKING ABOUT.

Whether you're seeking employer assistance, exploring scholarships or self-funding, remember that **investing in CFP® certification can give you more confidence** in the advice you offer, **help you build a bigger book of business with stronger client relationships** and lead to a higher salary.¹

The most important thing you can do: ASK!

Get in touch with your manager or HR department and ask what they can do to help you on the path to CFP® certification.

FOR MORE HELP ON YOUR PATH TO CFP® CERTIFICATION, EMAIL GETCERTIFIED@CFPBOARD.ORG.

1. According to the 2024 Compensation Survey, CFP® professionals earn an average of 10% more than those without CFP® certification.
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