CFP BOARD

AT A GLANCE

CFP Board has added the **Certified Investment Management Analyst® (CIMA®)** designation to the Accelerated Path.

Effective April 17, 2026, individuals who hold the CIMA® designation may satisfy the CFP® certification coursework requirement through the Accelerated Path, excluding the Capstone course.

Updated Competency Standards for CFP® Certification

Addition of Certified Investment Management Analyst® (CIMA®) Designation to the Accelerated Path

EFFECTIVE APRIL 17, 2026

WHY THIS CHANGE WAS MADE

The CIMA® designation reflects a depth of education and professional preparation that aligns with CFP Board's competency-based standards.

ADDING THE CIMA® DESIGNATION:

EXPANDS	RECOGNIZES	STREAMLINES	REFLECTS
access to the Accelerated Path for qualified professionals	professional preparation that aligns with CFP Board's competency-based standards	the path to certification while preserving full CFP® certification requirements	CFP Board's review of professional preparation and competency alignment

This update reflects CFP Board's broader commitment to keeping certification standards relevant, rigorous and aligned with real-world financial planning practice.

WHO IS ELIGIBLE

Individuals who have earned the CIMA® designation are eligible for the Accelerated Path.

WHAT THIS MEANS FOR CIMA® HOLDERS

CIMA® holders now have a more direct path to fulfilling the CFP® certification coursework requirement, reducing duplication while still requiring demonstration of full competency.

BOTTOM LINE: This change makes the path to CFP® certification more accessible for well-prepared professionals without lowering the bar. CFP® certification continues to reflect competency across education, exam, experience and ethics.

Learn more at:

CFP.net/CompetencyStandards

WHAT DOES NOT CHANGE

Accelerated Path eligibility does not waive CFP® certification requirements. Individuals with the CIMA® designation must still:

- Earn a bachelor's degree or higher
- Complete the Capstone course
- Satisfy the experience requirement
- Pass the CFP® exam
- Meet Fitness Standards and ethics requirement

ABOUT THE ACCELERATED PATH

The Accelerated Path allows you to sit for the CFP® exam sooner, expediting your path to CFP® certification and saving you time and money. That's because you can skip the majority of the coursework requirement for CFP® certification — based on your knowledge gained from other advanced degrees or professional certifications.

In addition to the Certified Investment Management Analyst® (CIMA®) designation, other credentials that qualify for the Accelerated Path include:

Certified Public Accountant (CPA)
Chartered Financial Analyst® (CFA®)
Chartered Financial Consultant® (ChFC®)
Chartered Life Underwriter® (CLU®)
Licensed Attorney
Doctor of Business Administration or Economics
CFP Certification from outside the U.S.

For more information on the Accelerated Path, visit:

CFP.net/AcceleratedPath

COMPETENCY STANDARDS UPDATE ROADMAP

EFFECTIVE PERIOD
Q2 2026

- **Addition of the Certified Investment Management Analyst® (CIMA®) designation to the Accelerated Path (implemented April 17, 2026)**
- **Clarification of independent practice competency (implemented April 21, 2026)**

EFFECTIVE PERIOD
Q1 2027

- **Standard Pathway to require experience that demonstrates at least three steps of the financial planning process**
- **Increase to 40 CE hours per two-year cycle (38 hours of general CE and 2 hours of CFP Board Ethics CE), allowing up to five hours focused on practice management**
- **Allow CE carryover of up to 10 hours into the next two-year certification cycle**
- **CFP Board may designate mandatory CE topics in response to significant regulatory or legal changes**

EFFECTIVE PERIOD
Q2 2027

- **Candidates may count up to 500 hours of qualified pro bono financial planning toward the 6,000-hour Standard Pathway experience requirement**