

EXPERIENCE FOR INDIRECT SUPPORT

To recognize the breadth and depth within the personal financial planning profession as part of its Experience requirement, CFP Board reviews activities and responsibilities reflecting personal financial planning knowledge and competencies that indirectly support the financial planner and/or the financial planning process.

CFP Board defines **Support** as those responsibilities and activities requiring personal financial planning knowledge and competency that support the financial planner and/or the financial planning process.

DEFINING INDIRECT SUPPORT

Indirect Support includes those positions that are firmly rooted in the financial planning process. Indirect Support Experience is reviewed and evaluated on a case-by-case basis. Depending on duties and responsibilities, partial or full qualifying credit may be granted. Some indirect support positions that are eligible include, but are not limited to, employee benefits administration, financial planning compliance, and journalism pertaining to financial planning topics.

DETERMINANT GUIDELINES

Candidates seeking CFP® certification through indirect support experience will be asked to answer these questions:

- ▶ What knowledge or competencies, as referenced in the Principal Knowledge Topics, are required for you to be successful in your role?
- ▶ What benefit and/or impact does the work you do have on the profession's body of knowledge and/or the practice of financial planning?
- ▶ How does this activity ultimately benefit the work done by financial planners, and/or individuals seeking financial planning services?
- ▶ What is the relationship pathway from the functions you perform to the typical client, the financial planner or the financial planning process?

Report your experience, at any time, through the online Experience Reporting Portal.
Log into your CFP Board account at CFP.net and clicking on the *Experience* section within the Certification Tracker.
Questions? Email experience@cfpboard.org