

Candidate Advocate

The Certified Financial Planner Board of Standards (“CFP Board”) - headquartered in Washington, D.C.-is the certifying body for financial planning professionals. It is a non-profit organization that fosters professional standards in personal financial planning through its setting and enforcement of the education, examination, experience, ethics, and other requirements for the CFP certification.

This position normally operates in a professional office environment. However, remote work may take place due to COVID-19 and any other pandemic or for any reason as determined by CFP Board’s CEO.

General Function:

CFP Board seeks a highly motivated Candidate Advocate who will support organizational growth initiatives by ensuring candidates for CFP® certification advance successfully through the certification process. Incumbent will be the primary outreach contact providing personalized advice and assistance for candidates.

Essential Functions

- Assists candidates with understanding exam registration, initial certification requirements, and next steps in the certification process
- Manages high volume of calls with existing or potential certificants; utilizes a variety of personal outreach approaches to facilitate candidate advancement through the certification process
- Provides advice and support on opportunities to complete requirements, especially exam support resources; understands when to provide advice and when to seek assistance from CFP Board staff experts on how to assist candidates with unique situations
- Creates personalized follow-up plans with candidates who have not taken next steps towards certification; understands the “why” and provide information that motivates action
- Delivers resources to candidates with real-life examples of how other candidates overcame obstacles, both professional and personal, to pass the CFP® exam and achieve CFP® certification.
- Provides reporting on personal candidate outreach and progress towards certification; collects, records and reports on individual contact feedback to identify common obstacles
- Attends mandatory training sessions to stay up to date on product or company policy changes
- Participates in special projects or support to various departments, as approved by supervisor
- Performs other duties as assigned

Background/Skills/Abilities Preferred

- A minimum of 1 years’ experience in customer service or a call center environment
- Outstanding customer service skills and behaviors, including active listening, rapport building skills, accuracy and professionalism

- Self-directed and motivated to pursue goals with only minimal management on a day-to-day basis
- Ability and interest to actively engage and interact with candidates via telephone and email on ongoing basis
- Strong written and verbal communication skills
- Ability to multi-task and be flexible to meet business needs
- Ability to work effectively and collaboratively with others
- Excellent attention to detail
- Proficient in Microsoft Office suite; database experience is a plus

To apply, send your resume and one-page letter summarizing your interest, qualifications, and salary expectations. Please reference the Candidate Advocate position in your cover letter. Email your application to humanresources@cfpboard.org, Attention: Director, Human Resources, CFP Board, 1425 K Street NW, Suite 800, Washington, DC 20005.

CFP Board believes that diversity of experience and perspective are strengths and seeks to continue to grow a highly committed, skilled, and collaborative staff.