

**CFP BOARD**

**CFP BOARD  
REMOTE  
TESTING  
POLICY AND  
AGREEMENT**

This Remote Testing Policy is one of CFP Board's Current Standards and Policies that is incorporated into the *Pathway to CFP® Certification Agreement* by reference. I previously agreed to the *Pathway to CFP® Certification Agreement*. I hereby affirm that I have read, understand, accept, and agree to be bound by the terms of the *Pathway to CFP® Certification Agreement*, including this Remote Testing Policy.

Remote proctoring is an exam delivery method that allows candidates to take the CFP® examination from home or a location of their choice, rather than at a Prometric test center.

***All exams are continuously monitored by video and audio recording. If you do not wish to be recorded (either by video or audio), please notify the proctor immediately of your intent not to proceed with the exam.***

## TEST ENVIRONMENT POLICY

### ENVIRONMENTAL REQUIREMENTS

Your office or home setting must meet the following requirements:

- Testing location must be indoors (walled), well lit, with a closed door and free from background noise and disruptions.
- No third party may be present in the room or enter the room for the duration of the exam. If this occurs, your exam will be terminated and/or your results invalidated.
- Your workstation and surrounding area must be free of pens, paper, electronic devices, etc. No content that could potentially provide an unfair advantage during your exam, including that posted on walls or within your immediate area, should be present during your exam session.

### CHECK-IN PROCESS

- Original, valid (unexpired), government issued photo & signature bearing identification is required in order to take an exam.
- You will be required to show your workstation and surrounding area.
- You will be required to raise your pants legs above your ankles, empty and turn all pockets inside-out and raise shirt sleeves above your wrists prior to every entry into the online test. If you are wearing eyeglasses you will be required to remove them for visual inspection to ensure they don't contain a recording device.
- Large jewelry items must be removed from your person prior to and throughout the duration of the exam.
- If you have long hair that covers your ears, you will be asked to pull your hair back to ensure nothing is attached to your ear that could provide an unfair advantage (such as a Bluetooth earpiece).
- Leaving the camera view while the exam is in progress is strictly prohibited.
- Changing location while testing, turning off lighting or audio, speaking to or receiving aid from other individuals is strictly prohibited.
- Candidates are required to be professional, civil and respectful at all times while testing.

### PROHIBITED ITEMS AND EXAMINEE CONDUCT IN THE VIRTUAL TEST CENTER

- Unauthorized personal items may not be accessible while testing. Such items include, but are not limited to: outerwear, hats, food, drinks, purses, bags or briefcases, notebooks, watches, cell phones, electronic devices, or wearable technology.
- Eating, smoking, and chewing gum are prohibited during the exam.
- Written notes, published materials and other testing aids are strictly prohibited.
- Light clothing items removed for comfort such as sweaters, suit jackets, scarves, etc., must be hung on the examinee's chair, not placed in laps or on the workstation desktop. Outerwear such as heavy coats, parkas, rain coats, etc., is not permitted in the immediate testing area.

## BREAK POLICY

### Scheduled break

- A 40-minute scheduled break will begin upon completion of section one or when time expires, whichever comes first. During your break you may leave the testing room to obtain food, water, or whatever you may need. The same check in process will be conducted before candidates are allowed to continue the examination (security check of testing environment and person). Please be sure that you are back to your seat by the end of the 40-minute session as your exam will automatically begin as soon as the 40 minutes have expired.

### Unscheduled breaks

- You will be allowed to leave the exam room during an unscheduled break to use the restroom or get a drink of water. **You are not allowed to access your cell phone or study materials during unscheduled breaks.** Please be aware that during an unscheduled break no additional time is provided, and the check-in process will be repeated when you return to the exam room (security check of testing environment and person)
- If you need an unscheduled break, **please raise your hand** so that the Remote Proctor may properly check you out of the exam.

## CALCULATOR POLICY

- The CFP® exam will include the basic calculator onscreen. Candidates will also be allowed to use one of the financial calculators approved by the [CFP Board calculator policy](#).
- Proctors will require candidates to clear the calculator memory during the check-in process. Calculators containing visible formulas must be covered with black electrical tape or by taping blank paper over the formulas. It is your responsibility to clear the calculator's memory. Loose batteries (without packaging) are permitted in the testing area.

## RESCHEDULING POLICY

In the event of a disruption to the remote test:

- Candidates can report exam connectivity issues to Prometric. Upon review and approval by CFP Board, candidates may receive one opportunity to take the exam at a test centre (contingent on appointment availability).

## EXAM RETAKE POLICY

- Individuals may attempt the exam a maximum of three times within a 24-month period. If an individual attempts the exam on three successive administrations, a one-year sit-out period (three exam administrations) is required before registering for another attempt.

## CONFIDENTIALITY OF EXAM CONTENT/SYSTEMS

- The remote proctoring application, computer based test delivery system, tutorial, exam content, your exam answers, your notes during the exam, and the survey (collectively "Exam Materials") are the confidential and proprietary materials and intellectual property of CFP Board
- Communicating, publishing, reproducing, or transmitting any part of any Exam Materials, in any form or by any means (e.g. verbal, electronic, written, etc.) for any purpose is strictly prohibited.

- ANY reproduction or disclosure of any Exam Materials, in whole or in part, will result in immediate notification to your test sponsor and potential filing of administrative, civil and/or criminal charges against you and anyone directing or conspiring with you.
- This provision is in addition to, and not in lieu of, any other confidentiality requirements to which you have agreed.

**Remote testing candidates are required to agree to the following:**

1. I am the person I represent to be for the exam session.
2. I understand that I will be monitored at all times during the exam to ensure strict adherence to exam security measures. Monitoring shall include audio and video recording of the exam session.
3. I will not remove or attempt to remove, whether through physical means, a recording device or otherwise, any written, printed, electronic or recorded examination questions or answers, in whole or in part.
4. I will not electronically capture or attempt to capture any examination content from my computer screen.
5. I will not reproduce or attempt to reproduce examination materials through memorization or any other means. This prohibition includes but is not limited to discussing, posting or disclosing such content via email, social media or other Internet presence, or otherwise. I understand that this disclosure prohibition applies before, during and after my session.

I hereby affirm that I have read, understand, accept, and agree to be bound by the terms of the *Pathway to CFP® Certification Agreement*, including this Remote Testing Policy.

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Name

\_\_\_\_\_  
CFP ID

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



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