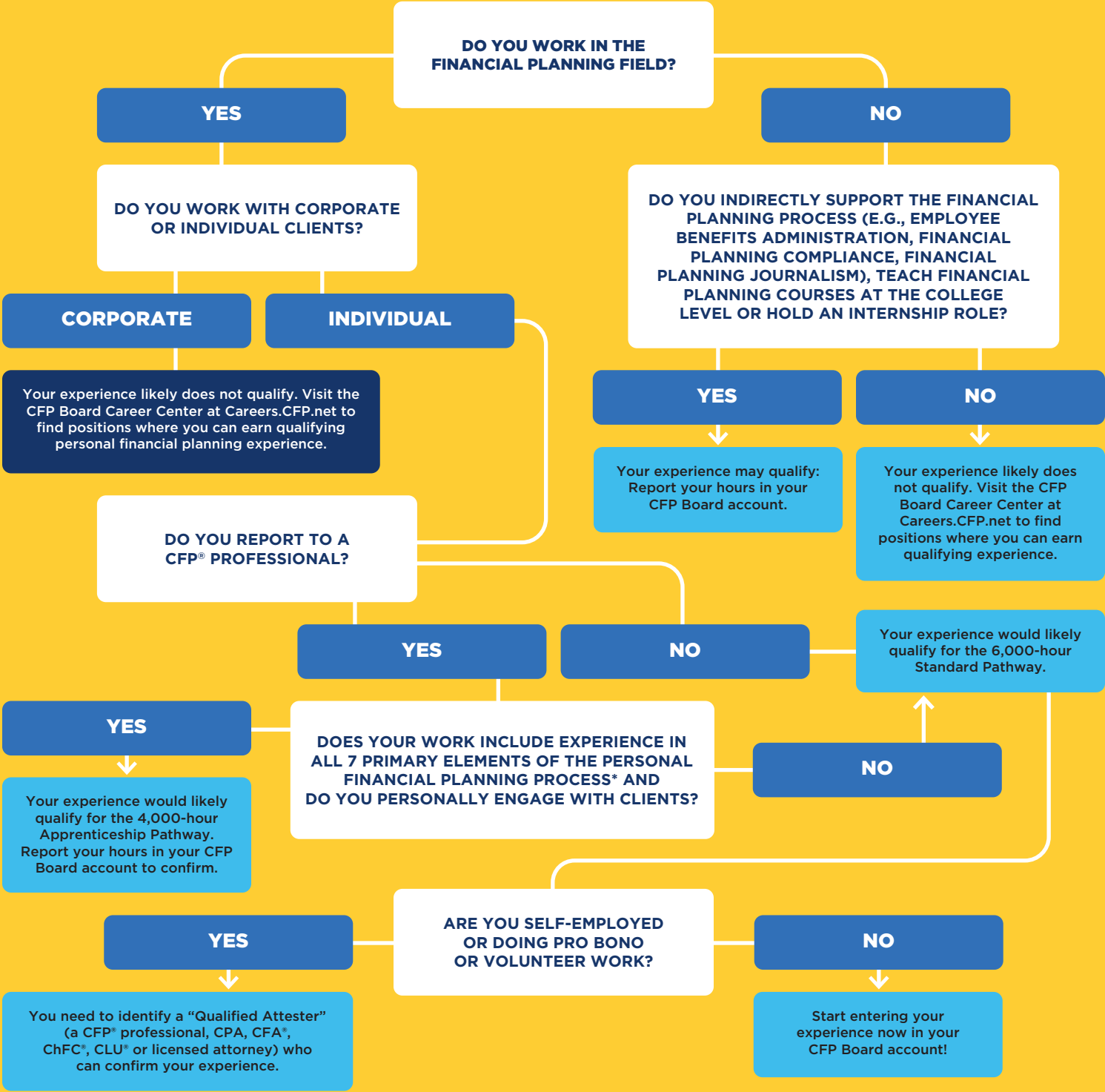


DOES MY EXPERIENCE QUALIFY FOR CFP® CERTIFICATION?

Use this flowchart to find out if your current professional role is likely to qualify for the CFP® certification experience requirement — or go straight to your account at [CFP.net/ReportExperience](https://www.cfp.net/ReportExperience) and enter your hours to see how many you’ve already accrued!



If you’re still not sure whether your experience qualifies, report it in your CFP Board account at [CFP.net/ReportExperience](https://www.cfp.net/ReportExperience) to find out. **You will not be penalized or disqualified from earning CFP® certification if your hours don’t count** — you’ll just need to accrue hours in the right roles.

If you’re coming to financial planning from another field, your experience likely doesn’t qualify for CFP® certification — even if you’ve got an advanced degree or many years in that field. Everyone is required to earn 4,000 to 6,000 hours of personal financial planning experience.

***7 Primary Elements of Financial Planning:**

- Understanding the Client’s Personal and Financial Circumstances
- Identifying and Selecting Goals
- Analyzing the Client’s Current Course of Action and Potential Alternative Course(s) of Action
- Developing the Financial Planning Recommendation(s)
- Presenting the Financial Planning Recommendation(s)
- Implementing the Financial Planning Recommendation(s)
- Monitoring Progress and Updating

Questions? Visit [CFP.net/Experience](https://www.cfp.net/Experience) to learn more.

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