

EXPERIENCE FOR A GRADUATE ASSISTANTSHIP

CFP Board recognizes the key role graduate assistants play in supporting the development and education of the next generation of personal financial planners. Graduate Instructors and Teaching Assistants can acquire valuable work experience by directly engaging with students. Likewise, Research Assistants can contribute to the Body of Knowledge that can indirectly support the growth and longevity of the financial planning industry.

QUALIFYING FACTORS

To qualify for experience credit, a graduate instructor, teaching or research assistant must meet the following criteria:

- Work under a clearly defined job description
- Report to a full-time or adjunct faculty member at a recognized CFP Board Registered Program
- Perform duties for a minimum of ten (10) hours per week for at least one quarter/semester

SUBMITTING EXPERIENCE FOR REVIEW

Graduate Assistants will submit experience under **Indirect Support**. When asked to describe duties and responsibilities Candidates should provide a detailed summary using these questions as a guideline:

- What knowledge or competencies, as referenced in the Principal Knowledge Topics, are required for you to be successful in your role?
- How does this activity engage with and ensure students are properly trained and understand the most important concepts of the Financial Planning process as they relate to the profession's body of knowledge?
- How does this activity ultimately benefit the work done by individuals who will become financial planners, and/or individuals seeking financial planning services?
- How many hours a week, on average, are spent in instruction/teaching related activities? Please provide details to support this estimate.

CFP Board reviews all Indirect Support experience and provides feedback on eligibility within 3-5 business days.

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. **Indirect Support** includes those positions that are firmly rooted in the financial planning process. Indirect support responsibilities and activities demonstrate financial planning knowledge and competencies, and indirectly support the financial planning process which will ultimately benefit an individual client.

QUALITY ATTESTER

Provide name and contact information for the faculty member providing your supervision. CFP Board may select to verify work experience with this supervisor.

HOURS ALLOWED

The maximum reported time is 40 hours per week. Only work directly related to instruction/teaching responsibilities will be considered.

Report your experience, at any time, through the online Experience Reporting Profile.

Log into your CFP Board account at CFP.net and clicking on the Experience section within the Certification Tracker.

Questions? Email experience@cfpboard.org