

EXPERIENCE FOR TEACHING (COLLEGE & UNIVERSITY LEVEL)

CFP Board recognizes the important role teaching plays in fostering the development of the next generation of personal financial planners. Teachers acquire valuable work experience when they create curriculums and directly engage students. Teachers support growth and longevity of the financial planning industry.

CFP Board defines **Teaching** as serving in the capacity as a full-time or adjunct faculty member responsible for the planning and delivery of financial planning related topics, at an accredited college or university, where instruction is equal to a minimum of 30 hours per quarter/semester.

QUALIFYING FACTORS

To qualify for experience credit, a teacher must meet the following criteria:

- Teach full-time as defined by the institution or a minimum of 30 hours per quarter/semester
- Primary instructor of the course
- Responsible for creating course syllabus, content and assessments
- Focus of the course is consistent with CFP Board's [Principal Knowledge Topics](#)

SUBMITTING EXPERIENCE FOR REVIEW

Experience will be submitted under **Teaching**. CFP Board reviews all Teaching experience and provides feedback on eligibility within 3-5 business days.

QUALIFIED ATTESTER

Provide name and contact information for the Department head who can verify your teaching activity. CFP Board may select to verify work experience with this individual.

HOURS ALLOWED

The maximum reported time for teaching is 40 hours per week if the teaching position is defined as full-time by the institution.

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