



CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

GUIDELINES TO CAPSTONE ALTERNATIVE ELIGIBILITY

The Capstone Alternative Program provides candidates who are eligible for Challenge Status and who also meet CFP Board's Experience requirement, an opportunity to alternately satisfy the Capstone segment of the Education requirement.

CAPSTONE ALTERNATIVE PROGRAM (CapAlt) vs THE CAPSTONE COURSE

- ▶ No minimum contact hours for the CapAlt Program. Students move directly to the final project - developing the Financial Plan. When the task is successfully completed the Education requirement is met.
- ▶ A Certificate of Eligibility is required for enrollment in a CapAlt Program. Students must produce the certificate before they register for the course or immediately upon registration.

TO BE SUCCESSFUL IN CapAlt

CapAlt will require a student to demonstrate his/her ability to integrate the knowledge they have in a variety of topic areas into a comprehensive financial plan without the aid of a financial planning software package. Those who will be successful in CapAlt have extensive experience in developing comprehensive financial plans and are knowledgeable in the following areas:

- ✓ Education Planning
- ✓ Estate Planning
- ✓ Investment Planning
- ✓ Retirement Savings & Income Planning
- ✓ Risk Management & Insurance Planning
- ✓ Tax Planning

REQUIREMENTS FOR ELIGIBILITY

Candidates must complete the following steps, in this order:

1. Meet CFP Board Education coursework requirement
2. Fulfill the Experience requirement
3. Submit the online Eligibility Request Form; receive a Certificate of Eligibility from CFP Board
4. Register for one of the Capstone Alternative options within 90 days of receipt of the Certificate
5. Successfully complete the course to meet the last step in the Education requirement

For eligibility and program details go to www.cfp.net, click on Become a CFP® Professional, Experience Requirement/Capstone Alternative Program.

Questions? Email experience@cfpboard.org.