CFP BOARD HOW TO MEET THE EXPERIENCE REQUIREMENT

There are two ways for candidates to fulfill the experience requirement for CFP® certification.

6,000 HOUR STANDARD REQUIREMENT

Based on a 40-hour week

DOING ONE OR MORE OF THESE

Personal delivery to individual client
Direct interaction and engagement with individual clients

Supervision of personal delivery
Supervision of financial planners or the financial planning process

Support of individual clients
Direct or indirect support of the financial planner and/or the financial planning process

Teaching
Financial Planning-related courses at a university, offered for college credit; or at a CFP Board-Registered Program

Internships or Residency Program
Completed an internship, or completed the FPA Residency Program

AND

DOING ONE OR MORE OF THESE

ELEMENTS OF PERSONAL FINANCIAL PLANNING

Establish and define client relationship
How do you define the scope of your engagement?

Gather data from client
What types of documents do you gather?

Evaluate client's financial status
How do you analyze and assess their status?

Develop and present recommendations
What does an average presentation include?

Implement recommendations
What tasks do you perform to enact a plan?

Monitor recommendations over time
How do you measure your plan's success?

OR

4,000 HOUR APPRENTICESHIP EXCEPTION

Based on a 40-hour week

DOING THIS

Personal delivery to individual client
Direct interaction and engagement with individual clients

AND

DOING IT THIS WAY

CFP™

Must be completed under the direct supervision of a CFP® professional
We request immediate verification from the CFP® professional

AND

DOING ALL OF THESE

ELEMENTS OF PERSONAL FINANCIAL PLANNING

Establish and define client relationship
How do you define the scope of your engagement?

Gather data from client
What types of documents do you gather?

Evaluate client's financial status
How do you analyze and assess their status?

Develop and present recommendations
What does an average presentation include?

Implement recommendations
What tasks do you perform to enact a plan?

Monitor recommendations over time
How do you measure your plan's success?

For more information on the experience requirement toward becoming a CFP® professional, visit:

CFP.NET/EXPERIENCE