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
- Supervision of personal delivery
- Support of individual clients
- Teaching
- Internships or Residency Program

**AND**

**DOING THIS**
- Personal delivery to individual client
  - Direct interaction and engagement with individual clients
- Supervision of personal delivery
  - Direct or indirect support of the financial planner and for the financial planning process
- Support of individual clients
  - Direct or indirect support of the financial planner and financial planning process

**AND**

**DOING IT THIS WAY**
- 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

**4,000 HOUR APPRENTICESHIP EXCEPTION**
Based on a 40-hour week

**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?

**AND**

**DOING ALL OF THESE**
- 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