CFP BOARD

2015 JOB TASK ANALYSIS
EXAMINATION AND EDUCATION REQUIREMENTS

FINANCIAL PLANNING JOB TASK DOMAINS

1. Establishing & Defining the Client-Planner Relationship
2. Gathering Information Necessary to Fulfill the Engagement
3. Analyzing & Evaluating the Client’s Current Financial Status
4. Developing the Recommendation(s)
5. Communicating the Recommendation(s)
6. Implementing the Recommendation(s)
7. Monitoring the Recommendation(s)
8. Practicing Within Professional & Regulatory Standards

CONTEXTUAL VARIABLES

FAMILY STATUS
- Traditional family
- Single parent
- Same-sex couples
- Blended families
- Widowhood

NET WORTH
- Ultra-high net worth
- High net worth
- Mass affluent
- Emerging affluent
- Mass market

INCOME LEVEL
- High
- Medium
- Low

LIFE OR PROFESSIONAL STAGE
- Student
- Starting a career
- Career transition
- Pre-retirement
- Retirement

OTHER CIRCUMSTANCES
- Health issues
- Divorce
- Change of employment status
- Aging parents
- Special needs children

Copyright © 2015 Certified Financial Planner Board of Standards, Inc. All Rights Reserved