Exam Registration Process

You will be able to register for the CFP® exam and schedule your testing appointment once you become eligible for the exam. CFP Board will notify you when your eligibility is confirmed and will provide you with a link to register.

On the following pages you will find the steps to register for your exam.
After you complete the CFP® Exam registration process in your CFP Board online account, you will receive a confirmation page like the example above. Begin the process to schedule your exam with Prometric by clicking the “Click here” link.
On the Prometric scheduling site, select “Certified Financial Planner” from the dropdown menu. Then choose “United States” and the state where you would like to take the CFP® Exam. Click the “Next” button to continue.
At the top of the page click "Schedule an Appointment."
Please read the notices on this page and select “I agree.” Click the “Next” button to continue.
In the “Eligibility ID” field, enter your CFP Board ID number. In the second field, enter the first four letters of your last name. Click the “Next” button to continue.
In the Search box, enter the area where you'd like to take the CFP® Exam. Click the “Search” button to generate a list of testing centers in the selected area.
From the list of available test centers, choose the one at which you would like to take the CFP® Exam, then click the “Schedule an Appointment” link for that test center.
Select the “Find available seats in a 3 month period” option and select a month when the CFP® Exam is offered. Click the “Go” button to find available appointments.
The calendar displays available dates for the CFP® Exam as highlighted and clickable links. Select one of these dates, and the available timeslot(s) for that date will appear on the right.
Select the available time you would like to take the CFP® Exam. In most cases, only one time will be available. In cases where multiple times are listed, pick your desired time. Click the “Next” button to continue.
Your CFP Board ID and first (or given) and last name will auto-fill on the form. Enter your address and contact information into the appropriate fields. Click the “Next” button to continue.
Please verify that the CFP® Exam date and location match your selections. (The information listed here is an example.) If you need to change any information, click the “Back” button and proceed from there. If all information is correct, click the “Complete Appointment” button to confirm your appointment.
Your appointment confirmation will be displayed, and you should receive an email from Prometric (emailconfirmations@prometric.com) with your appointment confirmation details within about 15 minutes. (The information listed here is an example.) Please save or print a copy of the appointment confirmation for your records. Your CFP® Exam appointment is now complete.