


About CFP BOARD

Founded in 1985 as a nonprofit professional regulatory organization, Certified Financial Planner Board of Standards Inc. (CFP Board) fosters professional standards in personal financial planning so that the public values, has access to and benefits from competent and ethical financial planning.

CFP Board is an independent certifying organization that owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and  (CFP marks). CFP Board regulates financial planners through trademark law by authorizing individuals who meet its certification requirements to use the CFP marks.

CFP® CERTIFICANTS

The majority of CFP® certificants are in the practice of personal financial planning and may be listed as such by CFP Board. CFP certificants are found in all 50 states and throughout the world. To check that your planner is authorized to use the CFP certification marks, contact CFP Board at 888-CFP-MARK or go to www.CFP.net/search.

CFP® CERTIFICATION

The public's growing need for objective financial planning advice, combined with the rigorous standards demanded of CFP® certificants, has placed the CFP certification at the forefront of the financial planning profession. Introduced in 1972, the CFP certification has become the most widely recognized financial planning credential among consumers. In the absence of uniform government regulation of financial planners, this certification reassures the public that those financial planners who are CFP practitioners have voluntarily agreed to adhere to high standards of competence and ethical practice established by CFP Board.

CFP® CERTIFICATION REQUIREMENTS

The CFP® certification process is based on financial planning job analyses research, which are conducted periodically among practicing CFP professionals.

Individuals must first show they have completed a personal financial planning curriculum, available through more than 160 U.S. colleges and universities, or satisfy the education requirement by having a qualifying designation or going through a transcript review process. They must then pass a 10-hour, two-day exam that tests their knowledge of the components of financial planning.

Prior to certification, individuals also must provide evidence of financial planning-related work experience. Finally, individuals must sign an affidavit disclosing any investigations or legal proceedings related to their professional or business conduct, and stating that they understand and agree to adhere to CFP Board's *Code of Ethics and Professional Responsibility* and *Financial Planning Practice Standards*.

RENEWAL REQUIREMENTS

All CFP® certificants must fulfill a biennial continuing education requirement and agree to abide by a strict standard of professional conduct, as outlined in CFP Board's *Code of Ethics*.

DISCIPLINARY OVERSIGHT

CFP Board investigates consumer complaints and CFP® professionals' disclosures of ethical problems, imposes disciplinary sanctions as warranted, and shares information with other regulatory bodies. CFP Board may suspend or revoke a CFP professional's right to use the CFP marks if it finds that he or she has violated the *Code of Ethics* or *Practice Standards*.

CERTIFIED FINANCIAL PLANNER

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