

Why a CFP® Professional?

CFP® professionals are dedicated to using the financial planning process to serve the financial needs of individuals, families and businesses. Most CFP professionals have earned a four-year college degree in a finance-related field, and have completed a course of study in financial planning approved by CFP Board.

To earn the prestigious CFP® certification and remain certified as a CFP professional, individuals must meet four main requirements.

CERTIFICATION REQUIREMENTS

Examination

CERTIFIED FINANCIAL PLANNNER™ Professionals must successfully complete CFP Board's comprehensive certification examination, which tests an individual's knowledge on various key aspects of financial planning.

Experience

CERTIFIED FINANCIAL PLANNER Professionals must acquire three years of financial planning-related experience before receiving the right to use the CFP certification marks.

Ethics

CERTIFIED FINANCIAL PLANNER Professionals must voluntarily ascribe to CFP Board's Code of Ethics and additional requirements as mandated. CFP practitioners who violate the code can be disciplined, including permanent loss of the right to use the CFP certification marks.

Education

CERTIFIED FINANCIAL PLANNER Professionals must complete 30 hours of continuing education every two years to stay current in financial planning knowledge, including ethics.

Compliance with these four areas informs you that an individual who holds the CFP certification mark is well prepared and qualified to give sound, professional advice.

CFP®, CERTIFIED FINANCIAL PLANNNER™ and federally registered CFP (with flame logo) are certification marks owned by Certified Financial Planner Board of Standards. These marks are awarded to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Find a Planner

Buying a home, saving for college or planning your retirement-it all starts with a plan. Your path to success often depends on the financial means to make your dreams come true, but you don't have to do it alone.

FPA's PlannerSearch(TM) can connect you with CERTIFIED FINANCIAL PLANNER(TM) professionals in your area. Find the right planner with multifaceted search options including location, name, and specialty.

To find a planner: <http://www.fpaforfinancialplanning.org/FindaPlanner/>