

CFP BOARD EXAM PREPARATION CHECKLIST

Helping you get ready for the CFP® exam

EXAM RESOURCES

- ☐ Download the [CFP® Exam Candidate Handbook](#)
- ☐ Download the [CFP® Exam Candidate Preparation Toolkit](#)
- ☐ Register for the “What to Expect on Exam Day” webinar or [watch the recording](#)

PREPARATION

- ☐ Develop a study plan and schedule leading up to the exam
- ☐ Take as many practice questions as possible, including the [CFP Board Practice Exam](#) (complimentary with CFP® exam registration).
- ☐ Sign up for and take an [exam review course](#)
- ☐ Join a study group and participate in the Study Group Forum on the [CFP Board Candidate Forum](#)
- ☐ Identify gaps in learning, set learning targets, and evaluate progress on closing those gaps
- ☐ Make sure to understand the Principal Topics covered on the exam
- ☐ Identify non-essential tasks that waste time, and eliminate roadblocks to studying

WORK AND PERSONAL LIFE

- ☐ Discuss your goal of pursuing certification with your family and employer
- ☐ Explore opportunities for flexible work arrangements while studying
- ☐ Ask if there are in-house resources available to help you prepare for the exam, such as exam fee reimbursement or review course reimbursement
- ☐ Meet with your family to discuss and understand the time commitment of studying
- ☐ Set up a study area free from distraction

LOGISTICS

- ☐ Review the test delivery software demo tutorial on [Prometric.com](#)
- ☐ Become familiar with the structure of the exam and the timing for each section and breaks
- ☐ Locate your exam center and practice driving the route at the same time of day as your scheduled exam
- ☐ Take a Prometric “Test Drive” at your exam location to become familiar with the exam software
- ☐ Review the Prometric test center rules and requirements
- ☐ For exam day, ensure that you have a valid government-issued ID that is not expired
- ☐ Ensure that your exam registration information matches the information on your ID

CFP BOARD