

There are two ways for candidates to fulfill the experience requirement for CFP® certification.

# 6,000 HOUR STANDARD PATHWAY

Based on a 40-hour week

## DOING ONE OR MORE OF THESE



**Personal delivery to individual client**  
Direct interaction and engagement with individual clients



**Supervision of personal delivery**  
Supervision of financial planners or the financial planning process



**Support of individual clients**  
Direct or indirect support of the financial planner and/or the financial planning process



**Teaching**  
Financial planning related courses at a university, offered for college credit; or at a CFP Board-Registered Program



**Internships or Residency Program**  
Completed an internship, or completed the FPA Residency Program

**AND**

## DOING ONE OR MORE OF THESE

### ELEMENTS OF PERSONAL FINANCIAL PLANNING



**Understand personal and financial circumstances**  
Are you obtaining, analyzing and addressing client information and circumstances?



**Identify and select goals**  
Are you identifying, selecting and prioritizing client goals?



**Analyze course of action and potential alternatives**  
Are you analyzing action plans and alternatives?



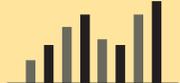
**Develop financial plan recommendations**  
Are you developing the recommendation?



**Present financial plan recommendations**  
Are you presenting the recommendation?



**Implement the financial plan recommendations**  
Are you implementing the plan with the client?



**Monitor progress and update**  
Are you monitoring and updating goals and recommendations?

# 4,000 HOUR APPRENTICESHIP PATHWAY

Based on a 40-hour week

## DOING THIS



**Personal delivery to individual client**  
Direct interaction and engagement with individual clients

**AND**

## DOING IT THIS WAY



**Must be completed under the direct supervision of a CFP® professional**  
We request immediate verification from the CFP® professional

**AND**

## DOING ALL OF THESE

### ELEMENTS OF PERSONAL FINANCIAL PLANNING



**Understand personal and financial circumstances**  
Are you obtaining, analyzing and addressing client information and circumstances?



**Identify and select goals**  
Are you identifying, selecting and prioritizing client goals?



**Analyze course of action and potential alternatives**  
Are you analyzing action plans and alternatives?



**Develop financial plan recommendations**  
Are you developing the recommendation?



**Present financial plan recommendations**  
Are you presenting the recommendation?



**Implement the financial plan recommendations**  
Are you implementing the plan with the client?



**Monitor progress and update**  
Are you monitoring and updating goals and recommendations?

For more information on the experience requirement toward becoming a CFP® professional, visit: