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FEBRUARY 19TH ASK THE EXPERT: ACCELERATED PATH TO CFP® CERTIFICATION

🔒 Thread closed by the administrator. It is viewable, but not accepting new replies.



asktheexpert

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Sara Maloney 02-13-2020 16:45

Hi everyone, Mark your calendars for our next Ask the Expert session on February 19 from 1-2pm E...

1. February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Sara Maloney

Posted 02-13-2020 16:45

Edited by Sara Maloney 02-20-2020 09:57

REPLY RE-OPEN THREAD



Hi everyone,

Mark your calendars for our next Ask the Expert session on February 19 from 1-2pm EST.

Our experts, @Erin Donahue, CFP®, CPA, and @Robert Falcon, CFP®, CPA, will be answering your questions about how they accelerated their path to sit for the CFP® exam by holding a qualifying credential. By gaining knowledge from other advanced degrees or professional certifications, candidates can skip the majority of the coursework requirement for CFP® certification and only have to take the Capstone course before sitting for the exam.

We will hear how they decided on their career path, started the CFP® certification process, and chose their Capstone course, and they will answer any questions candidates may have. So please join us on this post February 19 at 1pm EST!

Thanks!

Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

2. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Jason Sechrist

ACTIONS ▼

Posted 02-19-2020 12:56

REPLY RE-OPEN THREAD



Is there a link to sign into? Thanks so much!

Jason Sechrist

Jason Sechrist
Director
John Hancock
Boston MA
(978)430-7347

➤ ORIGINAL MESSAGE

3. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 12:57

Edited by Sara Maloney 02-20-2020 09:57

REPLY

RE-OPEN THREAD



You're in, @Jason Sechrist! How can we help?

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

➤ ORIGINAL MESSAGE

4. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Wooldy Pierre

ACTIONS ▼

Posted 02-19-2020 13:10

REPLY

RE-OPEN THREAD ▼

Hello Robert and Erin...I would like to sit for the CFP exam in July and however I have 2 1/2 courses left to complete. Based on your experience how much time should I anticipate needing to complete the capstone course? How much time should I aim to have available to complete a review course before the exam?

Wooldy Pierre
Client Service Specialist
TD Ameritrade
Morristown NJ

► ORIGINAL MESSAGE

5. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Erin Donahue

ACTIONS ▼

Posted 02-19-2020 13:23

REPLY

RE-OPEN THREAD ▼

@Wooldy Pierre Hi Wooldy! My capstone course ran for 4-6 weeks I believe. I spent 3 months going through the test prep course & self study, which was pretty condensed since I had "challenged" out of the rest of the education requirement. I hope that helps!

Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/>
erin@planwitherin.com

► ORIGINAL MESSAGE

6. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



NISHITH SHAH

ACTIONS ▼

Posted 02-19-2020 13:18

REPLY

RE-OPEN THREAD ▼

Hi Robert

please discuss the career transition into CFP , no experience, obstacles and path to cfp career

NISHITH SHAH
Senior Corporate Finance
Fluor Corporation
Placentia CA
(714)404-7585

► ORIGINAL MESSAGE

7. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:26

REPLY

RE-OPEN THREAD ▼

@NISHITH SHAH , I will take a shot at answering your question. Please respond back if I don't answer it completely.

I transitioned from the pharmaceutical industry to financial planning in my 50s. I was tired of mergers and acquisitions and worried about the next layoff. Getting my CFP(R) on top of my CPA was my way of taking control of my life. I remembered thinking at the time that "The only way that I will get fired is by one client at a time."

The challenge is building your book of clients after you transition. There will be years of sparse income, so you have to financially prepare for that. If you want to work for an RIA, you have to find the right fit. I spent a year after passing the exam networking on the side with any RIA that would speak with me.

I'll stop there. What did I miss?

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

➤ ORIGINAL MESSAGE

8. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Erin Donahue

ACTIONS ▼

Posted 02-19-2020 13:28

REPLY

RE-OPEN THREAD ▼

@NISHITH SHAH Hi Nishith! I had a gradual transition from working as a corporate accountant CPA to working as a Financial Planner. My career as a CPA led me to working as an accountant in a family office, where I was exposed to many elements that make up the financial planning profession. This is what piqued my interest and inspired me to pursue the CFP certification. After obtaining my CFP certification, I continued to work as a corporate accountant for a couple years while researching the financial planning industry on the side & learning / self-educating about where I might "fit in" and what kind of job I would want to have ideally. Eventually the "right" opportunity came up and I made the switch. It has been challenging as a career-changer, but if you find the right company & team, they will recognize that you bring your own set of strengths to the position, and will work with you to get you trained up & feeling confident!

Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/>
erin@planwitherin.com

➤ ORIGINAL MESSAGE

9. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



SUJIT WANI

ACTIONS ▼

Posted 02-19-2020 13:34

REPLY

RE-OPEN THREAD ▼

Hello,
Can we give exam of CFP through Prometric in India
And Can we get a Job in the Financial Planning field if someone doesn't have any
experience from India

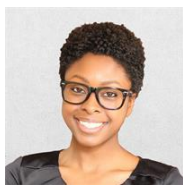
SUJIT WANI
FRESHER
FRESHER
KALYAN
9930294727 (8454003420)

► ORIGINAL MESSAGE

10. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Tara Spruill-Jones

ACTIONS ▼

Posted 02-19-2020 13:55

REPLY

RE-OPEN THREAD ▼

@Erin Donahue Hi Erin! Are you employed by Northstar while also running your own financial planning firm? If so, what sorts of disclosures are required?

@Robert Falcon Hi Robert! Do you know if it's possible for a CPA to maintain part-time employment (let's say during tax time) while building their own RIA to help combat the sparse income? I'm just trying to gauge how much of a "jump," I would need to take should I continue to pursue my CFP designation.

Thanks!

Tara Spruill-Jones
Certified Public Accountant
Washington DC
856-906-1302

► ORIGINAL MESSAGE

11. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Erin Donahue

ACTIONS ▼

Posted 02-24-2020 10:37

REPLY

RE-OPEN THREAD ▼

@Tara Spruill-Jones,

I do work for Northstar and consult with clients privately on the side. The standard disclosures are, of course, required for both. More information on those can be found here: <https://www.cfp.net/ethics/compliance-resources/2019/10/disclosures-required-when-providing-financial-advice-and-financial-planning>

Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/>
erin@planwitherin.com

► ORIGINAL MESSAGE

12. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

**NISHITH SHAH**

ACTIONS ▼

Posted 02-19-2020 13:55

REPLY

RE-OPEN THREAD ▼

Thanks for your feedback. Nishith

NISHITH SHAH
Senior Corporate Finance
Fluor Corporation
Placentia CA
(714)404-7585

➤ ORIGINAL MESSAGE

13. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



NISHITH SHAH

ACTIONS ▼

Posted 02-19-2020 13:58

REPLY

RE-OPEN THREAD ▼

Erin
Thanks for your feedback. Nishith

NISHITH SHAH
Senior Corporate Finance
Fluor Corporation
Placentia CA
(714)404-7585

➤ ORIGINAL MESSAGE

14. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Sara Maloney.

Posted 02-19-2020 12:57

REPLY RE-OPEN THREAD



Hi @Jason Sechrist,

The event will take place right here in a few minutes! Post any questions you have right on this discussion thread.

Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

➤ ORIGINAL MESSAGE

15. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Daniel Casperson

ACTIONS ▼

Posted 02-19-2020 13:00

REPLY

RE-OPEN THREAD ▼

How do I sign in?

Daniel Casperson
Producer
Brigham Young University - Idaho
Vashon WA
(206)478-5084

► ORIGINAL MESSAGE

16. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Sara Maloney

Posted 02-19-2020 13:02

REPLY

RE-OPEN THREAD ▼

@Daniel Casperson,

There is no sign in, just post any questions you have here!

Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

► ORIGINAL MESSAGE

17. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Nicholas Hailey.

ACTIONS ▼

Posted 02-19-2020 13:02

REPLY

RE-OPEN THREAD ▼

Hi,

With other certifications like the CFA and CAIA, there are study books provided and/or recommended. Can you confirm the best books to purchase for exam preparation?

Nicholas Hailey
Associate Banker
Citi Private Bank
Seattle WA

► ORIGINAL MESSAGE

18. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:06

REPLY

RE-OPEN THREAD ▼

@Nicholas Hailey, it really depends. Some prefer self-study, others like to attend classes in person. I've seen a lot of folks that love the Ken Zahn seminars. I did self study with CFFP materials, listened to Keir audio while driving in my car, and used the Zahn flash cards and Test bank questions.

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

► ORIGINAL MESSAGE

19. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Nicholas Hailey

ACTIONS ▼

Posted 02-19-2020 13:25

REPLY

RE-OPEN THREAD ▼

Thank you!

Nicholas Hailey
Associate Banker
Citi Private Bank
Seattle WA

► ORIGINAL MESSAGE

20. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Erin Donahue

ACTIONS ▼

Posted 02-19-2020 13:07

REPLY

RE-OPEN THREAD ▼

Hi @Nicholas Hailey! I wouldn't say that there is one "best" prep course. Each has slightly different features, so it makes sense to review the courses offered to see which fits well with your study approach & available time to devote! I used Kaplan successfully, based on the "live" webinar + self-study format (I had limited time to study nights and weekends). A colleague highly recommended Ken Zahn. A former co-worker used a different prep course that offered mp3 review material, which was great for studying on a long commute. I hope this is helpful as you evaluate which course is right for you!

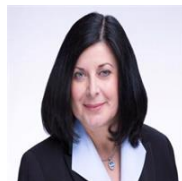
Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/>
erin@planwitherin.com

➤ ORIGINAL MESSAGE

21. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Josephine Trotta

ACTIONS ▼

Posted 02-19-2020 13:32

REPLY

RE-OPEN THREAD ▼

I just got back from the Live Review class from Brett Danko. HE IS AMAZING! I highly recommend his Signature Review Program and the Live Review Class. He has very detailed pre-study material (including flash cards) and a detailed plan up to the day you take the exam. I am planning on PASSING my exam on March 17th.

Josephine Trotta
Chief Investment Officer
Pathfinder Wealth Advisors LLC
Independence OH
216-533-0463

➤ ORIGINAL MESSAGE

22. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:43

REPLY

RE-OPEN THREAD ▼

@Josephine Trotta, I heard Brett Danko speak at a NAPFA conference here in Philly last Spring, and he was terrific. Lot's of humor and animation. He would certainly keep the CFP(R) exam study room very lively.

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

➤ ORIGINAL MESSAGE

23. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Hubert McIntosh

ACTIONS ▼

Posted 02-19-2020 13:03

REPLY

RE-OPEN THREAD ▼

@Sara please ignore my email I just sent, i'm here

Hubert McIntosh
Chief Financial Officer
RE-MMAP INC
West Palm Beach FL
954-701-4730

► ORIGINAL MESSAGE

24. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Sara Maloney

Posted 02-19-2020 13:01

Edited by Sara Maloney 02-20-2020 09:57

REPLY RE-OPEN THREAD



Our event is now LIVE! Please post any questions you have on this thread and an expert will respond to it directly on this thread.

To kick it off, @Erin Donahue and @Robert Falcon, why did you pursue CFP® certification after becoming a CPA?

Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

➤ ORIGINAL MESSAGE

25. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

1

RECOMMEND

Bhargav Patel

ACTIONS ▼

Posted 02-19-2020 13:03

REPLY RE-OPEN THREAD



What components are needed to be a CFP professional? Can you please guide us on how we can pass this exam?

Bhargav Patel
Student
Temple University
Philadelphia PA
267-572-1023

➤ ORIGINAL MESSAGE

26. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Erin Donahue

ACTIONS ▼

Posted 02-19-2020 13:13

REPLY

RE-OPEN THREAD ▼

Hi @Bhargav Patel! There are different paths to certification based on your existing credentials and background. This link outlines the general path: <https://www.cfp.net/get-certified/certification-process>

If you are a licensed CPA, for example, you can pursue the Accelerated Path to certification. This allows you to bypass the basic required coursework and skip right to the Capstone course. With respect to passing the exam, I would highly recommend enrolling in an exam prep course, no matter which path you choose!

I'm not sure if this is what you were asking. Did you have any other specific questions?

Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/>
erin@planwitherin.com

► ORIGINAL MESSAGE

27. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Terrence Ransom

ACTIONS ▼

Posted 02-19-2020 13:04

REPLY RE-OPEN THREAD



Hello there, just checking, is there a call-in number, or is this a live chat session?

Terrence Ransom
Relationship Consultant
The Vanguard Group
San Tan Valley AZ
480-277-2840

► ORIGINAL MESSAGE

28. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Sara Maloney

Posted 02-19-2020 13:07

REPLY

RE-OPEN THREAD ▼

Hi @Terrence Ransom,

There is no call-in number. We are having live discussions on this thread. Feel free to follow along or post a question of your own!

Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

► ORIGINAL MESSAGE

29. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Jason DeMeo

ACTIONS ▼

Posted 02-19-2020 13:05

REPLY RE-OPEN THREAD



Good afternoon, I have been approved for the Alternative Financial Plan Development (Capstone). Is my next step to enroll in a Capstone class?

Jason DeMeo
Partner
New York Life
Roseland NJ
(973)714-3687

► ORIGINAL MESSAGE

30. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:08

REPLY

RE-OPEN THREAD ▼

@Jason DeMeo yes

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

► ORIGINAL MESSAGE

31. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Lindsey Reder

ACTIONS ▼

Posted 02-19-2020 13:05

REPLY RE-OPEN THREAD



Hello! I am wondering if there is a resource available to outline a 3-4 month study plan?

Lindsey Reder
Junior Portfolio Manager
Silvercrest Asset Management Group
New York NY
(212)649-0721

➤ ORIGINAL MESSAGE

32. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Erin Donahue

ACTIONS ▼

Posted 02-19-2020 13:16

REPLY

RE-OPEN THREAD ▼

@Lindsey Reder Hi Lindsey! Are you referring to a "study plan" relating to the education requirement? Or have you completed the education requirement, and you are now interested in spending 3-4 months using an exam prep course?

Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/>
erin@planwitherin.com

➤ ORIGINAL MESSAGE

33. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Lindsey Reder

ACTIONS ▼

Posted 02-19-2020 13:27

REPLY

RE-OPEN THREAD ▼

I have nearly completed all of my education requirement, and am looking to plan out my studying in order to sit for the July exam. My goal in the next few weeks is to map out a "plan" so that the material doesn't overwhelm me.

Thank you!

Lindsey Reder
Junior Portfolio Manager
Silvercrest Asset Management Group
New York NY
(212)649-0721

► ORIGINAL MESSAGE

34. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Erin Donahue

ACTIONS ▼

Posted 02-19-2020 13:32

REPLY

RE-OPEN THREAD ▼

@Lindsey Reder Hi Lindsey! That's great that you are almost done with the coursework - congrats! Almost any exam prep course that you choose to enroll in will provide you with a study schedule. I used Kaplan, for example, and they provided me with a detailed checklist of what to complete each week - classes, reading, practice questions, etc. It took me 3 months to prep for the course (I may have added a week or two of just taking sample exams at the end!). I followed their study guide like a bible and it worked for me! I am fairly confident that all of the major test prep companies would provide you with a similar study planner. I hope this helps!

Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/erin@planwitherin.com>

► ORIGINAL MESSAGE

35. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

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RECOMMEND

Lindsey Reder

ACTIONS ▼

Posted 02-19-2020 13:51

REPLY

RE-OPEN THREAD ▼

Great, thank you very much for the thoughtful reply! I have been working with Dalton Education and I highly recommend them for anyone looking for an online option- live or self-paced. With a full-time job, I am hoping that 3 months will suffice for preparation.

Lindsey Reder
Junior Portfolio Manager
Silvercrest Asset Management Group
New York NY
(212)649-0721

► ORIGINAL MESSAGE

36. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Kari Skedsvold

Posted 02-19-2020 13:06

REPLY RE-OPEN THREAD



Can you please provide specific details on how a CPA can move faster (shortcut) in obtaining their CFP?

Kari Skedsvold
Financial Advisor
Ameriprise
Portland OR
503-450-0929

► ORIGINAL MESSAGE

37. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

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RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:12

REPLY

RE-OPEN THREAD ▼

@Kari Skedsvold, others that don't have an advanced credential have to take the underlying coursework. Since you have a CPA, however you can "challenge" the exam without taking all the required courses. The only class you need to take is a Capstone Course, which you can take online if you wish. If I can be loose with words, it's just like a huge test case where you help a hypothetical client by developing a financial plan.

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

► ORIGINAL MESSAGE

38. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Rebekah Clough

ACTIONS ▼

Posted 02-19-2020 13:07

REPLY RE-OPEN THREAD



Any suggestions on live review classes once completing coursework?

Rebekah Clough
Director of Client Services
Integrated Financial Group
Johns Creek GA
678-519-8678

➤ ORIGINAL MESSAGE

39. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:16

REPLY

RE-OPEN THREAD ▼

Ah @Rebekah Clough , that is a tough question, like "what is your favorite ice cream." Well, review classes aren't as much fun as ice cream, but everybody has their own preferences. Check out Ken Zahn's classes. I can say that I enjoyed his test bank questions and flash cards, and Keir's audio study guides were excellent if you have a commute.. I was not particularly impressed with the CFFP materials, however....I thought they were too voluminous.

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

► ORIGINAL MESSAGE

40. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Erin Donahue

ACTIONS ▼

Posted 02-19-2020 13:20

REPLY

RE-OPEN THREAD ▼

@Rebekah Clough Hi Rebekah! My only direct experience with a review course was doing a virtual "live review" - so, there was a teacher presenting via webcast, and the teacher could answer my questions real-time. This was a good fit for me because I had a LONG commute, a young child, and physically attending a review course was not do-able. I used Kaplan for this course and was happy with them! But there are many other providers--for example, Ken Zahn also comes highly recommended by a colleague I trust.

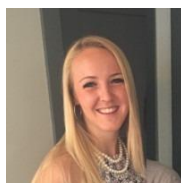
Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/>
erin@planwitherin.com

► ORIGINAL MESSAGE

41. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Erin Fitzpatrick

ACTIONS ▼

Posted 02-19-2020 13:10

REPLY RE-OPEN THREAD



Hello,

Thanks so much for holding this session and I look forward to your answers. I have a few questions and any advice you could provide is appreciated!

1. Could you speak to what factors went into your choice for school/program when applying for accelerated capstone programs?

2. How has attaining your CFP changed your career outlook? Have you changed careers completely or used this certification to advance your career or attain a promotion? Overall, how did you decide this was the best path for you and how has it impacted your career?

Thanks in advance!

Erin Fitzpatrick
Staff Accountant
None
Baltimore MD
(631)617-3110

► ORIGINAL MESSAGE

42. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Erin Donahue

ACTIONS ▼

Posted 02-19-2020 13:37

REPLY

RE-OPEN THREAD ▼

@Erin Fitzpatrick Hi Erin! 1) I only had a couple criteria. I was looking for something 100% virtual due to my long commute and limited study time available. I also took a look at the calendar for the course offerings to find one that was offered at a convenient time (both time of the year, and time of day) for me. I ultimately went with a name I knew (Kaplan) . But my good colleague highly recommends Ken Zahn as well! 2) I was working as a corporate accountant while I obtained the CFP certification. I continued in that line of work for another year and a half or so, but aggressively educated myself on the industry in my spare time. Listened to podcasts, subscribed to mailing lists, read blogs, etc. When the right opportunity came around, I took a chance on it. So I'm now officially a career-changer, working as a Financial Planner. So, it didn't specifically "advance" my career yet, but it did get me pointed in a direction that I'm excited and passionate about. I am confident that now that I've made the switch, I can continue to work my way up in this career, and to be more of my authentic

self! TMI probably, haha! I hope this helps.

Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/>
erin@planwitherin.com

► ORIGINAL MESSAGE

43. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



SUJIT WANI

ACTIONS ▼

Posted 02-19-2020 13:03

REPLY RE-OPEN THREAD



Hello, I am a CFP From India, so am I eligible for Accelerate Path

SUJIT WANI
FRESHER
FRESHER
KALYAN
9930294727 (8454003420)

► ORIGINAL MESSAGE

44. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:21

REPLY RE-OPEN THREAD



@SUJIT WANI , I don't know if there are any restrictions due to residency, but you do have to have an advanced credential. Here are the standard Accelerated Path rules from the CFP website: <https://www.cfp.net/get-certified/certification-process/education-requirement/certification-coursework-requirement/accelerated-path>

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

➤ ORIGINAL MESSAGE

45. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Charles Stephenson

ACTIONS ▼

Posted 02-19-2020 13:03

REPLY RE-OPEN THREAD



Sara; I'm not sure if responding to you is where to post questions or not?

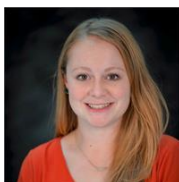
Charles Stephenson
CEO
VersaClaim, Inc.
Austin TX
512-417-6058

► ORIGINAL MESSAGE

46. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Sara Maloney

Posted 02-19-2020 13:09

REPLY RE-OPEN THREAD



@Charles Stephenson,

Post any questions you have by clicking "reply" on my initial post. Then your post will fall in the

correct order.

Let me know if you have any other questions!

Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

➤ ORIGINAL MESSAGE

47. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Angiena LaBarrie

ACTIONS ▼

Posted 02-19-2020 13:04

REPLY RE-OPEN THREAD



Can everyone share how they met the experience requirement. Thank you!

Angiena LaBarrie, CPA

Angiena LaBarrie
CEO
Your Personal Taxes
Baltimore MD

➤ ORIGINAL MESSAGE

48. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Gerard Hallaren

ACTIONS ▼

Posted 02-19-2020 13:10

REPLY RE-OPEN THREAD



I started working in the investment business in 1982.

Gerard Hallaren
CIO
NotResearch
Littleton CO
303-478-3132

➤ ORIGINAL MESSAGE

49. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Gerard Hallaren

ACTIONS ▼

Posted 02-19-2020 13:11

REPLY

RE-OPEN THREAD ▼

Do you have a suggested time budget for preparation?

Thanks,

G

Gerard Hallaren
CIO
NotResearch
Littleton CO
303-478-3132

► ORIGINAL MESSAGE

50. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Erin Donahue

ACTIONS ▼

Posted 02-19-2020 13:44

REPLY

RE-OPEN THREAD ▼

@Gerard Hallaren Hi Gerard! If you are a CPA pursuing the CFP certification via the accelerated path, you can use my time budget as a guide. It took me 1-1.5 months for the capstone course, and at least 3 months for the exam prep. The exam prep was the more rigorous when it comes to hours spent per week. I tried to devote 3 hours 4 to 5 times a week to studying, reading, classes, practice questions, etc. I hope this helps!

Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/>
erin@planwitherin.com

► ORIGINAL MESSAGE

51. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:31

REPLY RE-OPEN THREAD



@Angiena LaBarrie , I worked initially for a nice medium-sized RIA for my first 3 years. I worked under a CFP(R), so I was able to get my hours that way. Others start out on their own from the get-go, but I am not clear on exactly what they have to do to get their experience requirement signed off.

Robert Falcon, CFP(R), CPA/PFS, MBA

President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

➤ ORIGINAL MESSAGE

52. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Martin Knous

ACTIONS ▼

Posted 02-19-2020 13:04

REPLY RE-OPEN THREAD



Hello and thanks for taking the time to answer our questions!

1. I saw you are both also CPAs. How did your CFP studying and the test compare to the CPA?
2. Without taking all 7 CFP education courses, did you find that you needed extra exam review time to prepare for the exam?

Thanks!
Marty

Martin Knous
Associate
Flagstone Financial Advisors, Inc.
Denver CO

(970)401-1006

► ORIGINAL MESSAGE

53. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:40

REPLY RE-OPEN THREAD



@Martin Knous Great questions. Tough ones! I took the CPA exam so long ago I remember grinding out my studying 24-7. Used Gleim books (self study). The CPA exam was a lot tougher and required a lot more time in my opinion.

Your second question is excellent, and you hit a soft spot there. I did not have a lot of (call it "zero") estate experience, and only a little bit of insurance. Those were my Achilles heels and I had to spend a lot more time in those areas. Luckily, I had a lot of tax experience, so that part for me was easy and I spent less time than most there. Yes, I was an oddball in that tax category.

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

▶ ORIGINAL MESSAGE

54. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

1

RECOMMEND



PJ Boatwright

ACTIONS ▼

Posted 02-19-2020 13:04

REPLY RE-OPEN THREAD



I have found that there is too much content available. If I read all the books, watched all the videos, attended all the classes, completed all the practice exams, I would have to work a 20 hour week. So, having completed the ChFC largely by just taking the practice exams over and over again, that's what I've been doing for the last month or so. In your view, is this approach liable to work for me, and if not, what is most important for me to add to my study time. In other words, between the videos, books, classes, etc., what would be most helpful in addition to taking the practice exams over and over?

PJ Boatwright
Financial Advisor
Edward Jones
Southport CT
475-888-9386

▶ ORIGINAL MESSAGE

55. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



PJ Boatwright

ACTIONS ▼

Posted 02-19-2020 13:46

REPLY RE-OPEN THREAD



Would really welcome an answer to this question before time runs out. Thanks.

PJ Boatwright
Financial Advisor
Edward Jones
Southport CT
475-888-9386

► ORIGINAL MESSAGE

56. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:51

REPLY RE-OPEN THREAD



@PJ Boatwright , no I do not think you are off track at all. The CFFP materials I was using were in fact too voluminous. I initially thought I could read through them all, highlight them, and then condense the content into a study guide. Took way too long (got dragged down on the estate stuff). So, I started taking CFP(R) practice questions and exams, then going back through my wrong answers trying to figure out what I missed..

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

➤ ORIGINAL MESSAGE

57. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Denis Coelho

Posted 02-19-2020 13:05

REPLY RE-OPEN THREAD



Hello everyone,

I'm actually a CFP holder in Brazil and I'm taking all the steps to get the certification through the Accelerated Path. Does anyone know any professional who has taken in the same situation?

Regards,

Denis Coelho
Head of Distribution
BR Global
washington DC
305-676-4297

► ORIGINAL MESSAGE

58. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Sabina Wilks

ACTIONS ▼

Posted 02-19-2020 13:05

REPLY RE-OPEN THREAD



Hi - having problems getting in to the Live course. What do I click?

Sabina Wilks
Retirement Plans Specialist
ICMA-RC
Mantua NJ

► ORIGINAL MESSAGE

59. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

1

[RECOMMEND](#)

Rhonda Grover

ACTIONS ▼

Posted 02-19-2020 13:07

[REPLY](#) [RE-OPEN THREAD](#)



You have to continue refreshing your screen to see the new messages posted.

Rhonda Grover
Operations Manager
Wealth 360, LLC.
Lawrenceville GA
(309)259-0303

➤ [ORIGINAL MESSAGE](#)

60. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

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[RECOMMEND](#)

Sara Maloney

Posted 02-19-2020 13:08

REPLY RE-OPEN THREAD



@Sabina Wilks,

You're here! Follow along or post a question of your own on this discussion thread. There is no dial-in.

Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

➤ ORIGINAL MESSAGE

61. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:53

REPLY RE-OPEN THREAD



@Sabina Wilks this is the live chat. Type your question here.

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

➤ ORIGINAL MESSAGE

62. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Ahmad Aker

ACTIONS ▼

Posted 02-19-2020 13:07

REPLY RE-OPEN THREAD



I am living in Israel looking to get the CFP and back to work in USA, is it easy to study abroad and site for exams ?

Ahmad Aker
ahmedaker@gmail.com
Spring TX
(832)447-8601

► ORIGINAL MESSAGE

63. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Sabina Wilks

ACTIONS ▼

Posted 02-19-2020 13:07

REPLY RE-OPEN THREAD



Hi Sara - is there a live video/voice call in? or click , or is it just type questions?

Sabina Wilks
Retirement Plans Specialist
ICMA-RC
Mantua NJ

► ORIGINAL MESSAGE

64. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Sara Maloney

Posted 02-19-2020 13:12

[REPLY](#) [RE-OPEN THREAD](#)

@Sabina Wilks,

Just type your questions here!

Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

[➤ ORIGINAL MESSAGE](#)

65. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

[RECOMMEND](#)Angel Torres Rivera

ACTIONS ▼

Posted 02-19-2020 13:08

[REPLY](#) [RE-OPEN THREAD](#)

Please provide your best path to pass the CFP exam, I study very hard and fail the first time it was very disappointing to say the least.

Angel Torres , MSF Chfc

Angel Torres Rivera
FL
New Horizon MC LLC
Miami FL
(305)582-1104

➤ ORIGINAL MESSAGE

66. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Erin Donahue

ACTIONS ▼

Posted 02-19-2020 13:52

REPLY RE-OPEN THREAD



@Angel Torres Rivera Hi Angel! That's definitely frustrating, but I know you can do this!! For me, it came down to putting in the time to study in a condensed and consistent way. If I put something down for more than a week, it's embarrassing to admit this, but it slips out of my head so quickly! So I just made this a priority, and lived & breathed CFP test prep material for 3 months. Outside of work hours, if I sat down anywhere, I was looking at notes. If I was commuting, I was listening to mp3s. If I was at a desk, I was attending a live review course or answering sample questions. It's a slog, but for me I just had to get my brain to "critical mass" where I had just enough of the material in there all at once so that I could pass. I know everybody's study style is different, but that's what worked for me. I hope this helps!!

Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/>
erin@planwitherin.com

➤ ORIGINAL MESSAGE

67. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



PJ Boatwright

ACTIONS ▼

Posted 02-19-2020 13:10

REPLY RE-OPEN THREAD



Is there a WebEx video meeting with this as well or only this discussion thread?

PJ Boatwright
Financial Advisor
Edward Jones
Southport CT
475-888-9386

➤ ORIGINAL MESSAGE

68. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Sara Maloney

Posted 02-19-2020 13:12

REPLY RE-OPEN THREAD



@PJ Boatwright,

It is only this discussion thread. You can follow along reading the questions or post one of your own.

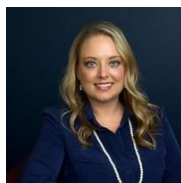
Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

➤ ORIGINAL MESSAGE

69. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Carmella Nodine

ACTIONS ▼

Posted 02-19-2020 13:14

REPLY RE-OPEN THREAD



Can someone qualify for the accelerated program with a bachelor degree and 16 years of experience with combined registered office assistant and registered rep/advisor without holding any other credential?

Carmella Nodine
Advisor
Navigation Financial Group
Amarillo TX
(806)242-0682

► ORIGINAL MESSAGE

70. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Valarie Wright

ACTIONS ▼

Posted 02-19-2020 13:17

REPLY RE-OPEN THREAD



Yes. I did.

Valarie Wright
Senior Registered Sales Associate

XO Wealth Management - Raymond James
Plano TX
(214)934-1377

➤ ORIGINAL MESSAGE

71. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 14:00

REPLY RE-OPEN THREAD



@Carmella Nodine Here are the requirements. I think you need an accelerated degree/credential. <https://www.cfp.net/get-certified/certification-process/education-requirement/certification-coursework-requirement/accelerated-path>

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

➤ ORIGINAL MESSAGE

72. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

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RECOMMEND



Wooldy Pierre

ACTIONS ▼

Posted 02-19-2020 13:16

REPLY RE-OPEN THREAD



Hello Robert and Erin...I would like to sit for the CFP exam in July and however I have 2 1/2 courses left to complete. Based on your experience how much time should I anticipate needing to complete the capstone course? How much time should I aim to have available to complete a review course before the exam?

Wooldy Pierre
Client Service Specialist
TD Ameritrade
Morristown NJ

► ORIGINAL MESSAGE

73. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Robert Falcon

ACTIONS ▼

Posted 02-19-2020 14:01

REPLY RE-OPEN THREAD



@Woody Pierre, i recall that the Capstone course took about 2 months, but this was back in 2013.

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

➤ ORIGINAL MESSAGE

74. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

NISHITH SHAH

ACTIONS ▼

Posted 02-19-2020 13:17

REPLY RE-OPEN THREAD



Career transition into CFP please discuss the path/avenues to do that. no financial experience or CFP experience.

NISHITH SHAH
Senior Corporate Finance
Fluor Corporation
Placentia CA
(714)404-7585

► ORIGINAL MESSAGE

75. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 13:57

REPLY RE-OPEN THREAD



@NISHITH SHAH , with no financial or CFP(R) experience, I would try to get a position with an existing RIA firm. Network/speak with/buy lunch or coffee for as many CFP(R)s as you can.

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

► ORIGINAL MESSAGE

76. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Gerard Hallaren

ACTIONS ▼

Posted 02-19-2020 13:22

REPLY RE-OPEN THREAD



Is there a recommended

time budget for studying?

Review Classes?

Complete program?

Thanks,

Gerard

Gerard Hallaren

CIO

NotResearch

Littleton CO

303-478-3132

► ORIGINAL MESSAGE

77. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Sara Maloney

Posted 02-24-2020 10:34

Edited by Sara Maloney 02-24-2020 10:34

REPLY RE-OPEN THREAD



Hi @Gerard Hallaren,

This question was answered a few times throughout this read, so I would recommend reading the other responses, particularly in post #49. Thanks!

Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

➤ ORIGINAL MESSAGE

78. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

NISHITH SHAH

ACTIONS ▼

Posted 02-19-2020 13:22

REPLY RE-OPEN THREAD



Sara

Please post the message / question about career transition into CFP. no financial industry experience, obstacles to face.
any support provided by CFP board? please discuss. thanks...

NISHITH SHAH

Senior Corporate Finance

Fluor Corporation

Placentia CA

(714)404-7585

► ORIGINAL MESSAGE

79. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Sara Maloney

Posted 02-19-2020 13:25

REPLY RE-OPEN THREAD



Hi experts,

@NISHITH SHAH had the following question: Currently, I am working in a 'corporate finance' area of multi national company. If I become a CFP, how should I transition into the financial/CFP field? What support system CFP board provides to new CFPs? I do not have any financial or banking experience but, I do have solid corporate accounting and finance experience.

Additionally, what are the avenues/options I have once I have passed the CFP exam? I am certainly open to transitioning into a CFP career via part time or weekend work/training after CFP pass.

Sara Maloney
Community Manager
CFP Board
candidateforum@cfpboard.org

➤ ORIGINAL MESSAGE

80. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 14:03

REPLY

RE-OPEN THREAD ▼

@NISHITH SHAH @Sara Maloney I believe I answered this above. Nishith, please refresh your browser.

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

► ORIGINAL MESSAGE

81. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

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RECOMMEND



Frank Reichel III

ACTIONS ▼

Posted 02-19-2020 13:27

REPLY RE-OPEN THREAD



Sara:

If I am a CFA with sufficient experience what else do I need to do to register for the accelerated path beyond what I have done below:

- 1) Forward Letter confirming CFA
- 2) Forward college transcript
- 3) Enter work experience

Thanks,
Frank

Frank Reichel III

CEO
TSW
Manakin Sabot VA
(804)306-7062

► ORIGINAL MESSAGE

82. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Stephen Adekeye

ACTIONS ▼

Posted 02-19-2020 13:30

REPLY RE-OPEN THREAD



Hi experts, how would you advise someone looking to make a change from investment management to financial planning? Are there areas I can explore by leveraging my foreign background/experience?

I am also taking the accelerated path through the CFA but having a hard time navigating opportunities in this transition.

Stephen Adekeye

► ORIGINAL MESSAGE

83. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 14:12

REPLY RE-OPEN THREAD



@Stephen Adekeye Stephen, you have a terrific skill set...do not get discouraged at all. You may find a home with a larger RIA that wants to have that CFA presence on staff. That is extremely valuable to clients who appreciate at least some active management in their portfolios.

Robert Falcon, CFP(R), CPA/PFS, MBA
President and Founder
Falcon Wealth Managers LLC
College Funding Solutions LLC
Concordville, PA
215-485-0771

➤ ORIGINAL MESSAGE

84. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Dewayne Deng

ACTIONS ▼

Posted 02-19-2020 13:38

REPLY RE-OPEN THREAD



What is a good career path from Life insurance/Annuity agent through AAMS to CKA. Would you consider this a health path, or is there training needed?

Dewayne Deng
Owner
MEFA
Starkville MS
(662)402-7538

► ORIGINAL MESSAGE

85. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Daniel Humphrey

ACTIONS ▼

Posted 02-19-2020 13:43

REPLY RE-OPEN THREAD



I have completed the Accelerated Program through Kaplan and now I'm trying to complete the review process for June 2020. My question is around scheduling through each week while working. I needs some help putting a plan together to stick to. How did you do this and what would you recommend?

Daniel Humphrey
Financial Advisor
Pruco Securities
Charlotte NC
704-421-7828
Prudential Financial
daniel.humphreyjr@prudential.com

► ORIGINAL MESSAGE

86. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



Erin Donahue

ACTIONS ▼

Posted 02-19-2020 14:00

REPLY RE-OPEN THREAD



@Daniel Humphrey Hi Daniel! I completed the Accelerated Program through Kaplan as well. I spent 3 months studying for the exam using Kaplan's test prep course, while working full time. It was a slog, but Kaplan offered online "live" review courses from 7:30-10:30pm 3 nights a week and that worked for my schedule. It wasn't pretty, but I made it happen. If the class ended early I stayed up and studied solo until 10:30 before turning in. On weekends, I tried to study for at least 3 hours on Saturday or Sunday mornings (I had a young child which made it a challenge!). I also had a long commute (2 hours each way), so on weekdays I would listen to

CFP review material (from Keir) on mp3. But coming back to your original question on studying, Kaplan provided me with a detailed week-by-week study planner for the test prep. It was a PDF downloadable through their portal. I stuck to that - did all the courses, reading, questions, etc. as recommended - and it worked for me! I hope this helps!

Erin Donahue, CFP®, CPA/PFS, CMA, CGMA
Financial Planner, Northstar
<https://www.northstarmoney.com/erin@planwitherin.com>

➤ ORIGINAL MESSAGE

87. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND



KYLE RASH

ACTIONS ▼

Posted 02-19-2020 13:55

REPLY RE-OPEN THREAD



Experts, I am curious to know how their experience has been in maintaining their CFP designation. Are the CE options difficult/time consuming? Are there options that can apply for CE credit across multiple designations/licenses?

Regarding the exam, I'm most interested in knowing what methods were used to understand the various formulas. Was repeating practice questions your main method of studying? What areas did you concentrate your studying on?

KYLE RASH

VP

Second Generation Anesthesia, INC

Anacortes WA

(360)632-5664 (3606325664)

▶ ORIGINAL MESSAGE

88. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

0

RECOMMEND

Erin Donahue

ACTIONS ▼

Posted 02-19-2020 14:04

REPLY RE-OPEN THREAD

@KYLE RASH Hi Kyle! I have not found the CE to be burdensome. As a CPA, I am able to find courses that double up on CPE & professional education requirements so that I can fulfill both at once (mainly tax-related courses - Surgent is fantastic, and they list out all the CE designations that each course satisfies). For understanding the formulas, repeating practice questions was important. But analyzing my work when I got things wrong was the most helpful. It was only by working through each and every misunderstanding (and there are many nuances to these formulas) that I was able to leverage repetition to achieve that deeper level of understanding. If that makes sense!!

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89. RE: February 19th Ask the Expert: Accelerated Path to CFP® certification

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RECOMMEND



Robert Falcon

ACTIONS ▼

Posted 02-19-2020 14:08

[REPLY](#) [RE-OPEN THREAD](#)

@KYLE RASH Kyle, @Erin Donahue and I are both CPAs. With that designation, we need to have 80 hours of CE every 2 years. There are a lot of hours offered through NAPFA, the AICPA, and the FPA. In addition, some monthly publications offer CE if you take tests based on the content in the monthly magazine..

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