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Cfp exam dates 2024

Total Number of Active CFP® Professionals Projected to Surpass 100,000 Certificants in U.S. WASHINGTON, April 15, 2024 /PRNewswire/ – CFP Board today announced the results of the March 2024 CFP® Certification Exam. The exam was administered during a March 12-19 testing window to 3,683 candidates. This is the largest number of people to ever sit for a CFP® Certification Exam in March, breaking last March's record of 3,527 exam-takers. The pass rate for the March 2024 exam was 68%. "This unprecedented turnout for the March 2024 CFP® exam reflects the recognition of CFP® certification as the standard for competent, ethical financial planning," said CFP Board CEO Kevin R. Keller, CAE. "As more Americans seek trusted and qualified advisors, the value of CFP® certification becomes increasingly evident. We congratulate all those who sat for the exam, and we look forward to welcoming the new CFP® certificants to our community of dedicated financial professionals." Based on the March CFP® exam results, CFP Board projects that the total number of active CFP® professionals will soon surpass 100,000 certificants in the U.S., representing about one-third of retail financial advisors. According to the March 2024 post-exam survey, the main reason exam-takers are pursuing CFP® certification is to demonstrate expertise in their job (87%), followed by to distinguish themselves as a fiduciary (73%). Of the exam-takers, 59% reported receiving some level of financial support from their employers during the CFP® certification process. Registration for the CFP® exam showed that 68% of March candidates are under 40 years old and 37% are under age 30. The 10 states with the most exam-takers were California, Texas, Illinois, Florida, New York, Pennsylvania, North Carolina, Michigan, Colorado and Massachusetts, with 1,895 candidates from these states sitting for the exam. Statistics from previous exams — including those from the March 2024 exam — are available on CFP Board's exam statistics webpage. July 2024 Exam The CFP® exam is offered three times annually, in March, July and November. Registration for the July 2024 CFP® Certification Exam is now open. This exam will be administered from July 9-16, 2024. The registration deadline is June 25, and the Education Verification deadline is June 18. Testing appointments are scheduled on a first-come, first-served basis. We therefore encourage individuals to register for the exam at least 60 days in advance for the best date and site availability. To begin the path to certification, CFP® certification candidates should create accounts on CFP.net. Here, they can access resources for all stages of their certification journey. ABOUT CFP BOARD CFP Board is the professional body for personal financial planners in the U.S. CFP Board consists of two affiliated organizations focused on advancing the financial planning profession for the public's benefit. CFP Board of Standards sets and upholds standards for financial planning and administers the prestigious CERTIFIED FINANCIAL PLANNER™ certification — widely recognized by the public, advisors and firms as the standard for financial planners — so that the public has access to the benefits of competent and ethical financial planning. CFP® certification is held by nearly 100,000 people in the U.S. CFP Board Center for Financial Planning addresses diversity and workforce development challenges and conducts and publishes research that adds to the financial planning profession's body of knowledge. SOURCE CFP Board Passing the QAFP® exam or CFP® exam is essential to gain certification as a QAFP professional or CFP professional. The competency-based exams offered by FP Canada™ assess your ability to apply financial planning knowledge to real-life situations and demonstrate competence in the practice of financial planning. The exams cover financial management, insurance and risk management, investment planning, retirement planning, tax planning, and estate planning and law for financial planning. Each exam is based on its respective FP Canada Standards Council™ competency profile. The exams are managed by the FP Canada Standards Council, and set by the council's Exam Panels. All candidates for an exam must attest that they understand and will follow all policies and procedures related to writing the exam, including those regarding ethics and conduct during and after the exam. Frequently Asked Questions What is Remote Proctoring? Toggle Open Remote proctoring is an exam delivery method that allows candidates to take the CFP® exam from home or a location of their choice, rather than at a Prometric test center. CFP Board's test delivery vendor, Prometric, will administer the CFP® exam to candidates through the ProProctor remote assessment platform versus testing at a Prometric test center. The security process and candidate check in procedures are comparable to the test center. Prometric live Proctors monitor the candidate test session through audio and video throughout the duration of the exam. What are the best practices for you to avoid technology issues? Toggle Open Perform the system check and test the internet connection on the same computer that you plan to use on exam day, around the same time of day you plan to take your exam. Use a hard-wired (Ethernet) connection to your router. Remote proctoring software requires stable internet. You may experience difficulties with even the best Wi-Fi connection. If you do choose to use Wi-Fi, ask other household members to reduce technology use during your exam (this includes phones, other computers, streaming devices...etc.). If you are unable to take a clear photo of your photo ID using your web camera; hold your ID at a farther distance for clarity. If you are taking the CFP® exam on your work computer, please confirm that there is no employer firewall restriction on connectivity and software download. If a technical issue occurs during your exam, click the "I'm Here to Help" chat button at the bottom of the page. Go through the auto questions and get support by a Live Support Agent. Please review this support link before exam day: What is the remote testing deadline? Toggle Open Exam Deadline is the same as the scheduling deadline. What is the difference between taking the exam at home/office and taking it at a Prometric test center? Toggle Open The main difference is your testing location. The remote testing security procedures match the level of scrutiny you will experience at a Prometric test center and the exam interface is the same. However, while the test center is responsible for a compatible testing environment, it is the candidate's responsibility to ensure a distraction-free environment when taking the exam at home/office. What are the system requirements for remote proctoring? Toggle Open To qualify for remote proctoring, you will need a fast and reliable internet connection and a computer or laptop that meets these minimum technical requirements: Screen Resolution: 1024 X 768 (Recommended: 1920px x 1080px) Operating System: Windows 8.1 or MacOS 10.13 or higher except for 13.0 through 13.2.1. NOTE: iPad/Android tablets are not currently supported. Microsoft Surface or similar can be used only when configured in laptop mode. WebCam Resolution: 640 X 480p. Using a mobile device as a web camera is not supported. Microphone: Enabled Download Speed: 1.0 mbps (recommended 5.0 mbps) Upload Speed: 0.5 mbps Important: VPNs, firewalls, and Virtual Machines (VMs) are not compatible with ProProctor. How do I check if my computer meets the system requirements for remote proctoring? Toggle Open You are advised to run the System Readiness Check. The results will help you to determine if your system meets the minimum technology requirements and if your operating system is compatible to install and run the ProProctor application. The system check can be conducted at any time at I have completed the system check. Is there anything else I need to check to make sure my computer is appropriate for the CFP® exam? Toggle Open You need a computer with screen resolution of 1920 X 1080 for the CFP® exam to display properly. Please note that the ProProctor system check verifies a standard resolution of 1024 X 768. How do I check/change my screen resolution to 1920 X 1080? Toggle Open You can check your computer's screen resolution using the check resolution button below. After clicking the button, it will display your computer's screen resolution. What is my screen resolution? Additional Verification — and Steps for Changing Your Screen Resolution Below are additional methods for checking your screen resolution and how to change your resolution if needed. For Windows computers: Click on the Windows Start button in the bottom left corner. Click on Settings (the gear icon). Click on System, which should populate the Display setting. Scroll down, and under Scale and Layout choose 1920 x 1080 for Display resolution. For Mac computers: Open System Preferences and click on Displays. Hold down the Option/Alt key while simultaneously clicking on the radial button next to the 'Scaled' option under Resolution. This will reveal all available screen resolution options for your display. Choose 1920 x 1080. I already have an appointment at a test center but would like to test at home. How do I schedule a remote testing appointment? Toggle Open Navigate to the CFP Board test sponsor page on Prometric.com and select the reschedule option. The system will prompt you for your confirmation number. Prometric rescheduling fees apply. Scheduling Changes No charges are applied for scheduling changes 30 days or more in advance of the scheduled exam appointment with Prometric. A \$100 scheduling change fee is applied for changes made between 5 to 29 days in advance of the scheduled exam. No changes are permitted less than 5 days in advance of their scheduled appointment. If you are moving your exam date from one exam administration to a future exam administration, the in-window Reschedule Policy does not apply. Instead, you are subject to either the withdrawal or postponement policy. This policy only addresses rescheduling an exam appointment during the same testing window. What are the test requirements for a home or office setting? Toggle Open Your remote testing environment must meet the following requirements during the check-in process with a Prometric Readiness Agent: Testing location must be indoors (walled), well lit, free from background noise and disruptions. No third party may be present in the room or enter the room for the duration of the exam. If this occurs, the proctor will terminate your exam and/or invalidate your results. Your workstation and surrounding area must be free of pens, paper, electronic devices, etc. No content that could potentially provide an unfair advantage during your exam, including that posted on walls or within your immediate area, should be present during your exam session. Regulations allow two tissues at the workstation, but the Proctor will inspect the tissues prior to the start of the exam. What should I expect on test day? What is the remote candidate check-in process? Toggle Open I. During the check-in process the following self-service steps will occur: 1. The ProProctor system will prompt you to capture your image. 2. The system will prompt you to capture an image of your government-issued ID. 3. The system will prompt you to read a check list to ensure the following is in place before meeting with a readiness agent a. Clean workspace b. Environment suitable for testing c. Environment, clothing, and devices are compliant with Security requirements II. You will meet the Prometric Readiness Agent who will guide you through three security checks before launching your exam: 1. ID Verification Your readiness agent will confirm your name, address, and exam details with you via video chat. 2. 360° Environmental Check Your Readiness Agent will ask you to provide a 360° view of your environment using your webcam. Your agent will ask you to scan your work surface using your webcam. We strongly recommend having a medium-to- large mirror during your environmental check. During this step, your Readiness Agent will ask to inspect things such as bookshelves, wall hangings, electronic devices such as televisions, ("It is recommended to have a large bedsheet or linen available if asked to cover any area of clutter") IMPORTANT: Do not have your laptop connected to a docking station anytime during the setup of your exam. This can cause connectivity issues. Make sure to clear your workspace and put away all personal items. 3. Candidate Person Check Your Readiness Agent will ask you to stand up to do a scan of your person. This scan will include – but is not limited to – conducting a sleeve, pocket and glasses check. Additionally, you will be asked to turn all pockets inside out. Remove large jewelry items from your person prior to and throughout the duration of the exam. IMPORTANT: In order to expedite the check-in process, please remember to empty your pockets prior to the visual check. Prometric's "What to Expect" video provides a summary of the information provided: What happens if I experience a disruption to the exam due to internet connectivity? What should I do? Toggle Open If you are still connected to the internet, the live proctor will attempt to reach you via chat or audio to troubleshoot the problem. Once connectivity is re-established, you will follow the candidate check in procedures for starting the exam. In case you get disconnected from the internet, do the following: Wait for 3-4 minutes post disconnection. Reboot your desktop / laptop. Run the system check and ensure all the checks pass. Re-launch your exam using the "Launch exam" button on the top. You must go through the whole check-in process again, however your exam would start from the point where it was disconnected. Lost time cannot be recovered. If connectivity cannot be reestablished due to an unstable or lost internet connection, the exam will be terminated. Candidates can report the issue to Prometric. Upon review and approval by CFP Board, candidates may receive one opportunity to take the test again at a test center (contingent on appointment availability). How can I prevent internet connectivity from disrupting my exam? Toggle Open Have a stable internet connection Identify the place in their house where Wi-Fi is strongest and test there. CFP Board recommends direct hardwired internet connection instead of Wi-Fi. Do not have other family members using up internet bandwidth with Netflix, social media, etc. Will I be able to see the Proctor on my computer during the exam? Toggle Open The live Prometric Proctor will monitor the candidate throughout the examination, but the candidate will be unable to see the Proctor during the exam. However, the Proctor can be contacted at any time via chat. When necessary, the Proctor can also contact the candidate by chat or audio. Can I use a tablet or smart phone to take the remote proctored exam? Toggle Open No, candidates must use a computer to complete the CFP® exam via ProProctor. Hybrid tablet/laptop devices such as the Microsoft Surface are not compatible with the ProProctor application. What is allowed and not allowed in my testing area? Toggle Open Unauthorized personal items may not be accessible while testing. Such items include, but are not limited to outerwear, jewelry, hats, food, drinks, purses, bags or briefcases, notebooks, watches, cell phones, electronic devices, or wearable technology. Test at home policies prohibit eating, drinking, smoking, and chewing gum during the exam. Proctors also restrict candidates from taking written notes or using published materials and other testing aids during the exam. A virtual scratchpad is available for taking notes. No physical scratch paper, pens, and pencils are permitted for note taking. Candidates must hang light clothing items they remove for comfort such as sweaters, suit jackets, scarves, etc., on their chair. They must not place the light clothing in laps or on the workstation desktop. Proctors restrict candidates from maintaining outerwear such as heavy coats, parkas, raincoats, etc., in the immediate testing area. Policies prohibit candidates from changing location while testing, turning off lighting or audio, or speaking to or receiving aid from other individuals. Can I take breaks during the exam? Toggle Open Yes, due to the length of the CFP® exam you receive one scheduled 40-minute break between section one and section two of your exam. Candidates are able to take unscheduled breaks at any time during the exam session. Please note that the exam clock continues to run during the unscheduled break. To begin your break, you must notify the Proctor before leaving the view of the camera. Failure to notify the Proctor prior to taking a break will result in termination of your exam session. When you return from break you must perform the same security check in routine administered at the start of your exam. How will I receive my exam results after completing the test? Toggle Open Candidates will receive preliminary results following completion of their exam. You will receive your official results letter by email approximately four – six weeks following the close of the window. Exam The CFP® exam assesses your ability to apply financial planning knowledge to real-life financial planning situations. By passing this exam, you demonstrate your competency to practice financial planning. CFP Board provides a remote testing option for the CFP® exam. (See more details and FAQs.) Date Details Jun 24, 2024 Exam Registration Opens Jul 24, 2024 Exam Prep Webinar Aug 5, 2024 CFP PEP/ Bridge Program Assessment deadline Aug 12, 2024 Early Bird Ends Last day to request testing accommodation or French exam Sep 9, 2024 Registration closes Last day to withdraw from an exam sitting, change location or change writing format Sep 16, 2024 Transcript & IPE Deadline Last day to select online proctored exam connection start time Oct 7, 8, 2024 CFP Exam Days Oct 15, 2024 Last day to request a postponement TBD Results released for the CFP exam (Date will be published at fpcanada.ca approximately two weeks prior to the results release date.) Source: FP Canada The next QAFP exams will be held on June 3, 2025, October 7, 2025 and January/February 2026. The next CFP exam sittings are on June 4 and 5, 2025, then October 8 and 9, 2025, and May 2026. CERTIFIED FINANCIAL PLANNER™ certification is the standard of excellence in financial planning. CFP® professionals meet rigorous education, training and ethical standards, and are committed to serving their clients' best interests today to prepare them for a more secure tomorrow. About the Exam The CFP® exam is offered three times per year: March, July and November. Test topics include the financial planning process and principles, tax planning, income and retirement planning, estate planning, risk management and insurance, among other important topics. All facets of the exam are guided by CFP® professionals, including determination of content coverage, scoring and passing criteria. LEARN MORE ABOUT THE EXAM Schedule Your Exam Appointment Before scheduling an exam appointment, you must register for the exam through CFP Board EXAM REGISTRATION INFORMATION For general exam appointment questions, you may call or email Prometric. Reschedule Your Exam Appointment Candidates may change their CFP® exam date, exam location, or scheduled start time within the same testing window at a fee of \$35 if the request is made 31-60 days or more in advance of their scheduled date. A \$100 scheduling change fee is applied for changes made between 5 to 30 days in advance of the scheduled exam. No changes are permitted less than 5 days in advance of the scheduled appointment. To reschedule to a new testing appointment within your registered exam window, select the Reschedule button under your preferred testing format, TEST CENTER EXAM or REMOTELY PROCTORED EXAM. You may reschedule from a remotely proctored exam to a test center exam, or from a test center exam to a remotely proctored exam. RESCHEDULING/CANCELLATION POLICIES Candidates who would like to move their exam date from one exam administration window to a future exam administration are subject to either the withdrawal or postponement policy. CFP Board Testing Policies Be sure to read all testing policies related to the CFP® certification exam requirement on the CFP Board Website. Exam Take the CFP® exam with confidence. We've compiled the resources and strategies below to help you prepare for the exam and give you an idea of the kinds of questions you'll be asked. With the right preparation, you can increase your chances of success.