



Certified Financial Planner™

Tim Goodwin, Joe Beckford, and Justin Pitcock are all CERTIFIED FINANCIAL PLANNER™ professionals.

This is a designation that entails very rigorous requirements including an education component, exam, experience, and ethics requirement. Here is a little about the certification requirements below.

education

The two-part education requirement includes: (1) Completing coursework on financial planning through a CFP Board Registered Program, which typically takes 12-18 months. (2) Holding a bachelor's degree or higher (in any discipline) from an accredited college or university.

exam

Passing the CFP® exam demonstrates that you've attained the knowledge and competency necessary to provide comprehensive personal financial planning advice. The CFP® exam is a 170-question, multiple-choice test that consists of two 3-hour sessions over one day. The exam includes stand-alone and scenario-based questions, as well as questions associated with case studies.

experience

The experience requirement prepares you to provide personal financial planning to the public without supervision. You can fulfill the experience requirement either before or after you take the exam. You need to complete either 6,000 hours of professional experience related to the financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.

ethics

The ethics requirement is the final step on your path to CFP® certification. It indicates you've agreed to adhere to high ethical and professional standards for the practice of financial planning, and to act as a fiduciary when providing financial advice to your client, always putting their best interests first.