Financial Education
CFP® Exam Prep

CFP® ASSESSMENT EXAM

Welcome to your CFP® Exam Assessment!

This assessment is designed to test your understanding of CFP® exam topics and identify any weak areas that may require more focused study time. This guide will outline how to take the Assessment, as well how to interpret your results.

How to Take the Assessment Exam

The Assessment Exam consists of 50 multiple choice questions, and you will have one attempt to produce your assessment score. There is no minimum score required or time limit.

To begin your Assessment, click the Assessment Exam icon and hit “Launch”. The Assessment will pop up immediately with the first question.

As you move through the exam, you have the option to review and check questions before submitting the exam. This is helpful in the event that you are not sure of your answer, and want to mark a question for review and move on through the Assessment at an exam-taking pace. To do this, simply check the box labeled “Check for Review”. When all 50 questions have been answered, you will then be routed back to review those questions you’ve selected. Once you have reviewed these questions, you can submit your Assessment for scoring.

You will receive instant scoring after your Assessment submission. You can then review your exam questions by question by clicking “Review” on your Attempt. This screen will show you what questions you got correct or incorrect; click “Go” to see correct answers and answer rationales. Page through every answer rationale by clicking “Next” or return to your overall score by clicking “Return to Summary”.

You can then access the Performance Tracker, either from the Summary or from your Dashboard home screen. The Performance Tracker allows you to see how you scored by topic area. Click “Compare with Others” to view how other Assessment Exam takers are scoring relative to your score.

Your Next Steps

The CFP® Certification Process

The next step is to evaluate where you are in the entire CFP® Certification process. Ensure you understand and meet the 4 Es, put in place by CFP Board:

Education

Ensure you've completed and submitted your education requirement to CFP Board. If you completed all of your education requirements with Kaplan this is done for you! Learn more about the education requirement here.

Exam

- Register for your testing window. The exam is offered at testing centers nationwide 3 times per year in March, July, and November, and consists of multiple choice questions. Kaplan can help determine what exam window makes sense for you.
- Once you have chosen your exam window, it's time to study! CFP Board recommends 250 hours of exam prep. Kaplan's integrated exam prep programs help you break down those study hours into manageable sessions, focusing on core subject matter and highly testable exam topics. Learn more about Kaplan's review solutions in the next section.

Experience

- CFP Board requires 3 years of full-time personal financial planning experience or 2 years of Apprenticeship experience to qualify for certification. This experience can be completed before or after sitting for the exam. View the full experience requirement here.

Ethics

- Applicants must pass CFP Board's Candidate Fitness Standards as well as a background check. See the full ethics requirement here.
  - Once certified, CFP professionals must complete 3 renewal requirements every 2 years:
  - Submit a certification application
  - Pay a $325 certification fee
  - Complete a minimum of 30 hours of continuing education (CE). Kaplan offers the required Code of Ethics course as well as over 50 CE courses approved for certification credit. View these courses here.

Are you a Challenge Candidate?

Challenge Candidates are those who hold existing credentials and qualify to bypass a portion of the education requirement. Learn more about the Challenge Candidate option here.

Challenge Candidate Exam Prep

Kaplan offers Challenge Candidates the ability to complete education course 101-106 on an audit basis to refresh their knowledge of key concepts and topics. After reviewing any coursework, Challenge Candidates complete Kaplan's Financial Plan Development Course and continue preparing for the exam with a Review package.

Learn More >

Review for the CFP® Exam

If you have successfully completed your education program, you are ready to start preparing for your exam! Kaplan's comprehensive, integrated exam prep programs are specifically designed to ensure you cover the core topics of the curriculum and focus on highly testable exam topics. Choose the format that best fits your lifestyle: Onsite, Live Online, or OnDemand Review Class, or a complete Self-Study option.

Learn More and Order >

Additional Support and Guidance

Kaplan is dedicated to your success and helping you earn your CFP® mark! If you have any questions, rest assured there is a team ready and excited to help answer them and guide you on your certification journey.

Connect with Your Support Team

Get answers to your questions regarding the certification process, selecting a study program, or getting the most out of your study tools.

Kaplan Student Relations Specialists | 800.373.0199 | srs@kaplan.com

For assistance and questions relating to your Dashboard and Assessment Exam and guidance on your career path.

Kaplan Account Managers | 888.394.2069

For assistance in ordering Kaplan's CFP® Exam Prep Review.

Kaplan Technical Support | 800.824.8742 | contactus@kaplan.com

www.kaplanfinancial.com/contact-us

For log in and access issues, including password resets and system requirements.