Financial Education | 2018 - 2019

CFP® Exam Prep

10-Week Study Planner Checklist

This 10-week Study Planner provides an easy-to-follow, tested strategy for your successful completion of the CFP® exam. Studying for this exam requires a time commitment on your part. It is wise to set aside scheduled, non-interrupted time of 18 to 25 hours per week, depending on your knowledge and experience with the CFP® exam topics. If you are not scheduled for Live Review classes, your study time should be on the higher end of the estimate.

It is important for you to follow all steps in this study plan, even if you feel you know certain topics. CFP Board tests topics using many different approaches, some of which may be different from your personal experience or perspective. These various approaches are presented in your study materials and the eLibrary videos.

Live Review Students: You should incorporate your classes into this study planner. Also, be sure you have prepared by studying the content to be presented in each class before the respective class. Note that the weekly time estimate above is in addition to your time attending class.

10 Weeks Prior to Exam

Study Reference	Assignment	Done
Pre-Study Assessment	Take the Pre-Study Assessment (located on your course Dashboard under Getting Started> Pre-Study Assessment). Once completed, review your results to understand where your knowledge (and application of that knowledge) is weak. Then, go to the Recall and Review Qbank for practice questions for your weaker areas. See the PDF titled *Pre-Study Assessment Results and Next Steps* for more details. Note that your Pre-Study Assessment results may also indicate where you may need to spend additional study time.	☐
Book 1 *General Financial Planning Principles, Professional Conduct, and Regulation*	Read and study Book 1 in its entirety, and complete the Analyze and Apply questions throughout the book.	☐
eLibrary	Watch the General Financial Principles videos found in the eLibrary icon on your Dashboard. These videos illustrate various approaches CFP Board can take when testing exam topics that students may find more challenging. *(Available to Live Review Class students only.)*	☐
Live Review In-Class Guide	Read through the General Financial Principles, Professional Conduct, and Regulation section. *(Available to Live Review Class students only.)*	☐
Test Prep QBank	Answer 50 Analyze & Apply questions from the General Financial Principles, Professional Conduct, and Regulation section of the Test Prep QBank icon on your Dashboard. Lesson Reminder: The Analyze and Apply QBank represents challenging questions that test exam topics.	☐
Supplemental Resource Materials	Read thoroughly and study the *CFP Board Standards of Professional Conduct*. You will find a PDF of the *Standards* on your course Dashboard at Supplemental Resource Material>CFP Board Standards of Professional Conduct. You may want to read through the *Standards* several times during your study to familiarize yourself with it.	☐
High 5 Exam Application and Testing Approaches	Watch the High 5 Exam Application and Testing Approaches videos for *CFP Board Standards and General Principles*. Here, Subject Matter Experts (SMEs) will present ways CFP Board may test the *CFP Board's Standards of Professional Conduct* and discuss testing approaches for the highly testable topics in Book 1. See additional information in the High 5 Exam Application and Testing Approaches icon on your Dashboard. *(Available to Live Review Class students only.)*	☐

9 Weeks Prior to Exam

Study Reference	Assignment	Done
Book 2 *Risk Management, Insurance, and Employee Benefits Planning*	Read and study Book 2 in its entirety, and complete the Analyze and Apply questions throughout the book.	☐
eLibrary	Watch the Insurance Planning videos found in the eLibrary icon on your Dashboard. These videos illustrate various approaches CFP Board can take when testing exam topics that students may find more challenging. *(Available to Live Review Class students only.)*	☐
Live Review *In-Class Guide*	Read through the Risk Management, Insurance, and Employee Benefits Planning section. *(Available to Live Review Class students only.)*	☐
Test Prep QBank	Answer 50 Analyze & Apply questions from the Risk Management, Insurance, and Employee Benefits Planning section of the Test Prep QBank icon on your Dashboard. Lesson Reminder: The Analyze & Apply QBank represents challenging questions that test exam topics. Because this is meant to be a supplemental study tool, Book 2 should be studied thoroughly before answering these questions.	☐
High 5 Exam Application and Testing Approaches	Watch the High 5 Exam Application and Testing Approaches videos *for Insurance Planning*. Here, Subject Matter Experts (SMEs) discuss testing approaches for the highly testable topics in Book 2. See additional information in the High 5 Exam Application and Testing Approaches icon on your Dashboard. *(Available to Live Review Class students only.)*	☐

Notes:

8 Weeks Prior to Exam

Study Reference	Assignment	Done
Book 3 *Investment Planning*	Read and study Book 3 in its entirety, and complete the *Analyze and Apply* questions throughout the book.	☐
eLibrary	Watch the Investment Planning videos found in the eLibrary icon on your Dashboard. These videos illustrate various approaches CFP Board can take when testing exam topics that students may find more challenging. *(Available to Live Review Class students only.)*	☐
Live Review *In-Class Guide*	Read through the Investment Planning section. *(Available to Live Review Class students only.)*	☐
Test Prep QBank	Answer 50 Analyze & Apply questions from the Investment Planning section of the Test Prep QBank icon on your Dashboard. Lesson Reminder: The Analyze & Apply QBank represents challenging questions that test exam topics. Because this is meant to be a supplemental study tool, Book 3 should be studied thoroughly before answering these questions.	☐
High 5 Exam Application and Testing Approaches	Watch the High 5 Exam Application and Testing Approaches videos for Investment Planning. Here, Subject Matter Experts (SMEs) discuss testing approaches for the highly testable topics in Book 3. See additional information in the High 5 Exam Application and Testing Approaches icon on your Dashboard. *(Available to Live Review Class students only.)*	☐

Notes:

7 Weeks Prior to Exam

Study Reference	Assignment	Done
Book 4 *Tax Planning*	Read and study Book 4 in its entirety, and complete the Analyze and Apply questions throughout the book.	☐
eLibrary	Watch the Tax Planning videos found in the eLibrary icon on your Dashboard. These videos illustrate various approaches CFP Board can take when testing exam topics that students may find more challenging. *(Available to Live Review Class students only.)*	☐
Live Review *In-Class Guide*	Read through the Tax Planning section. *(Available to Live Review Class students only.)*	☐
Test Prep QBank	Answer 50 Analyze & Apply questions from the Tax Planning section of the Test Prep QBank icon on your Dashboard. Lesson Reminder: The Analyze & Apply QBank represents challenging questions that test exam topics. Because this is meant to be a supplemental study tool, Book 4 should be studied thoroughly before answering these questions.	☐
High 5 Exam Application and Testing Approaches	Watch the High 5 Exam Application and Testing Approaches videos for Tax Planning. Here, Subject Matter Experts (SMEs) discuss testing approaches for the highly testable topics in Book 4. See additional information in the High 5 Exam Application and Testing Approaches icon on your Dashboard. *(Available to Live Review Class students only.)*	☐

Notes:

6 Weeks Prior to Exam

Study Reference	Assignment	Done
Book 5 *Retirement Savings and Income Planning*	Read and study Book 5 in its entirety, and complete the Analyze and Apply questions throughout the book.	☐
eLibrary	Watch the Retirement Planning videos found in the eLibrary icon on your Dashboard. These videos illustrate various approaches CFP Board can take when testing exam topics that students may find more challenging. *(Available to Live Review Class students only.)*	☐
Live Review *In-Class Guide*	Read through the Retirement Savings and Income Planning section. *(Available to Live Review Class students only.)*	☐
Test Prep QBank	Answer 50 Analyze & Apply questions from the Retirement Savings and Income Planning section of the Test Prep QBank icon on your Dashboard. Lesson Reminder: The Analyze & Apply QBank represents challenging questions that test exam topics. Because they are meant to be a supplemental study tool, Book 5 should be studied thoroughly before answering these questions.	☐
High 5 Exam Application and Testing Approaches	Watch the High 5 Exam Application and Testing Approaches videos for Retirement Planning. Here, Subject Matter Experts (SMEs) discuss testing approaches for the highly testable topics in Book 5. See additional information in the High 5 Exam Application and Testing Approaches icon on your Dashboard. *(Available to Live Review Class students only.)*	☐

Notes:

5 Weeks Prior to Exam

Study Reference	Assignment	Done
Book 6 *Estate Planning*	Read and study Book 6 in its entirety, and complete the Analyze and Apply questions throughout the book.	☐
eLibrary	Watch the Retirement Planning videos found in the eLibrary icon on your Dashboard. These videos illustrate various approaches CFP Board can take when testing exam topics that students may find more challenging. *(Available to Live Review Class students only.)*	☐
Live Review *In-Class Guide*	Read through the Estate Planning section. *(Available to Live Review Class students only.)*	☐
Test Prep QBank	Answer 50 Analyze & Apply questions from the Estate Planning section of the Test Prep QBank icon on your Dashboard. Lesson Reminder: The Analyze & Apply QBank represents challenging questions that test exam topics. Because they are meant to be a supplemental study tool, Book 6 should be studied thoroughly before answering these questions.	☐
High 5 Exam Application and Testing Approaches	Watch the High 5 Exam Application and Testing Approaches videos for Retirement Planning. Here, Subject Matter Experts (SMEs) discuss testing approaches for the highly testable topics in Book 6. See additional information in the High 5 Exam Application and Testing Approaches icon on your Dashboard. *(Available to Live Review Class students only.)*	☐

Notes:

4 Weeks Prior to Exam

Study Reference	Assignment	Done
Book 7 *Financial Planning Case Studies*	Answer the odd-numbered Item Sets located in the Item Set and Mini-Case Questions section of Book 7. Check your answers and review the topics that you still find challenging.	☐
Book 7 *Financial Planning Case Studies*	Read, study, and answer the questions in the following cases presented in Book 7. Check your answers against the Answer Summary and read the Solutions located at the end of each case. Read rationales to understand why the correct answer was most appropriate. *Nicholson Case* *Topplemeir Case* *Berger Case* *Farrell Case* *Savage Case* *Roth Case*	☐

Notes:

3 Weeks Prior to Exam

Study Reference	Assignment	Done
Book 7 *Financial Planning Case Studies*	Answer the even-numbered Item Sets located in the Item Set and Mini-Case Questions section of Book 7. Check your answers and review the topics that you still find challenging.	☐
Book 7 *Financial Planning Case Studies*	Work through the Mini-Cases in the Item Set and Mini-Case Questions section of Book 7. Check your answers and review the topics you still find challenging.	☐
Book 7 *Financial Planning Case Studies*	Read, study, and answer the questions in the following cases presented in Book 7. Check your answers against the Answer Summary and read the Solutions located at the end of each case. Read rationales to understand why the correct answer was most appropriate. *Ackerman Case* *Blocker Case* *Klar Case* *Hobart Case* *Martin Case* *Wood Case*	☐

Notes:

2 Weeks Prior to Exam

Study Reference	Assignment	Done
Stress-Free Webinar	View the recorded session of the Stress-Free Webinar, *Stress-Free in the Home Stretch*. The presenter will discuss what you should bring on exam day, the exam layout, topics you will likely see tested, and answer your exam-related questions. Information and the link to the Stress-Free Webinar are located in the Webinars icon on your Dashboard. *(Available to Live Review Class students only.)*	☐
Mock Exam	Watch the Mock Exam video found in the Mock Exam icon on your Dashboard. This video will demonstrate an overview and strategy for taking the exam. *(Available to Live Review Class students only.)*	☐
Mock Exam	Take the online Mock Exam found in the Mock Exam icon on your Dashboard. Be sure to download the case study PDFs for this exam. For details, go to EPR Mock Exam>EPR Mock Exam Case Study Facts on your course dashboard.	☐

Notes:

1 Week Prior to Exam

Study Reference	Assignment	Done
Books 1–7	Study Books 1–7, re-read your notes, and work on questions covering topics that still feel challenging to you or that you have performed poorly on in practice.	☐

Relax… remember the tips provided in the **Stress-Free Webinar.**

Best of luck on your exam!

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