Review Course for the CFP® Certification Examination

Review the seven-core subject matter (Financial Planning, Insurance, Employee Benefits, Investments, Income Taxation, Retirement Planning, and Estate Planning,) focusing on key areas within the 89 topics tested on the CFP® Certification Examination.

Pre Work

As a reminder, this is a REVIEW course and not a VIEW course. As such, your instructor will expect each participant to have completed the Keir Educational Resources' Comprehensive Review for the CFP® Certification Examination Volumes I and II. Depending on your background knowledge, this pre work could take you up to 100 hours or more to complete.

Course Work

During the course, your instructor will use PowerPoint slides to review the key topics. The instructor will provide you with a copy of these slides for your use during the class and as a reference tool. **Please bring all of your Keir materials with you to class,** as we will refer to several sections for examples and pages to read as homework and/or post work.

Post Work

After completing the review course, you should plan on spending time reviewing the material, answering application questions and completing the practice examination. We recommend studying a minimum of 200 hours in order to properly prepare for the examination. If your schedule permits, we highly recommend taking some time off from work prior to the examination.

CFP® Examination Pass Rates

The CFP® Certification Examination is a tough two-day exam. The national pass ratio is most often found to be in the fifty percent range. Keir's pass rate averages 20% points higher than the national average in the seventy to eighty percent range.

Financial Calculator

Although the use of a financial calculator is decreasing on the CFP® Certification Examination, you will still need to be able to use the features of your financial calculator. It is important that you know how to use your calculator **before** you come to class. For example, you should know how to solve for the purchase price of a bond and how to calculate the future value of an annuity stream. If you are not familiar with time value of money concepts and how to use a financial calculator, you should review Keir Educational Resources' Time and Money: Using Time-Value Analysis in Financial

Planning. Your instructor uses a HP-12C calculator and will give examples during class on both the HP-12C and HP-10B.

Instructor Comments

During the course, your instructor will provide examination tips to help you prepare for and pass the CFP® Certification Examination. However, as mentioned above, you will need to spend additional time studying both before and after this review course in order to be thoroughly prepared to sit for the rigorous CFP® Certification Examination.

Examination Registration

It is your responsibility to register with the CFP® Board of Standards in order to take this examination. Registration deadline for the examination is posted at www.CFP.net. The exam application is also available on this website.

Day 1:

8:00 - 8:15	Welcome, Introduction and Overview of Days 1, 2, 3 and 4
8:15 - 10:00	Income Tax Planning
10:00 - 10:15	Break
10:15 - 12:00	Income Tax Planning
12:00 - 1:00	Lunch
1:00 - 3:00	Income Tax Planning
3:00 - 3:15	Break
3:15 - 4:45	General Principles of Financial Planning
4:45 - 5:00	Recap of Day 1 plus assignment of cases

Day 2:

8:00 - 8:45	Recap of Day 1, Overview of Day 2, and Review homework
8:45 - 10:00	Estate Planning
10:00 - 10:15	Break
10:15 - 12:00	Estate Planning
12:00 - 1:00	Lunch
1:00 - 3:00	Estate Planning
3:00 - 3:15	Break
3:15 - 4:45	Insurance Planning and Risk Management
4:45 - 5:00	Recap of Day 2 plus assignment of cases

Day 3:

8:00 - 9:00	Recap of Day 2, Overview of Day 3, and Review homework
9:00 - 10:00	Employee Benefits Planning
10:00 - 10:15	Break
10:15 - 11:30	Employee Benefits Planning
11:30 - 12:00	Retirement Planning
12:00 - 1:00	Lunch
1:00 - 3:00	Retirement Planning
3:00 - 3:15	Break
3:15 - 4:45	Insurance Planning and Risk Management
4:45 - 5:00	Recap of Day 3 plus assignment of cases

Day 4:

8:00 - 9:00	Recap of Day 3, Overview of Day 4, and Review homework
9:00 - 10:00	Investment Planning
10:00 - 10:15	Break
10:15 - 12:00	Investment Planning
12:00 - 1:00	Lunch
1:00 – 2:00	Investment Planning
2:00 – 2:30	CFP Exam - What to expect and tips for passing the exam
2:30 - 2:45	Break
2:45 - 4:45	Practice Exam or Additional Review of Topics Selected by Class
4:45 - 5:00	Conclusion and Evaluations

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