

Work with a CERTIFIED FINANCIAL PLANNER™ professional

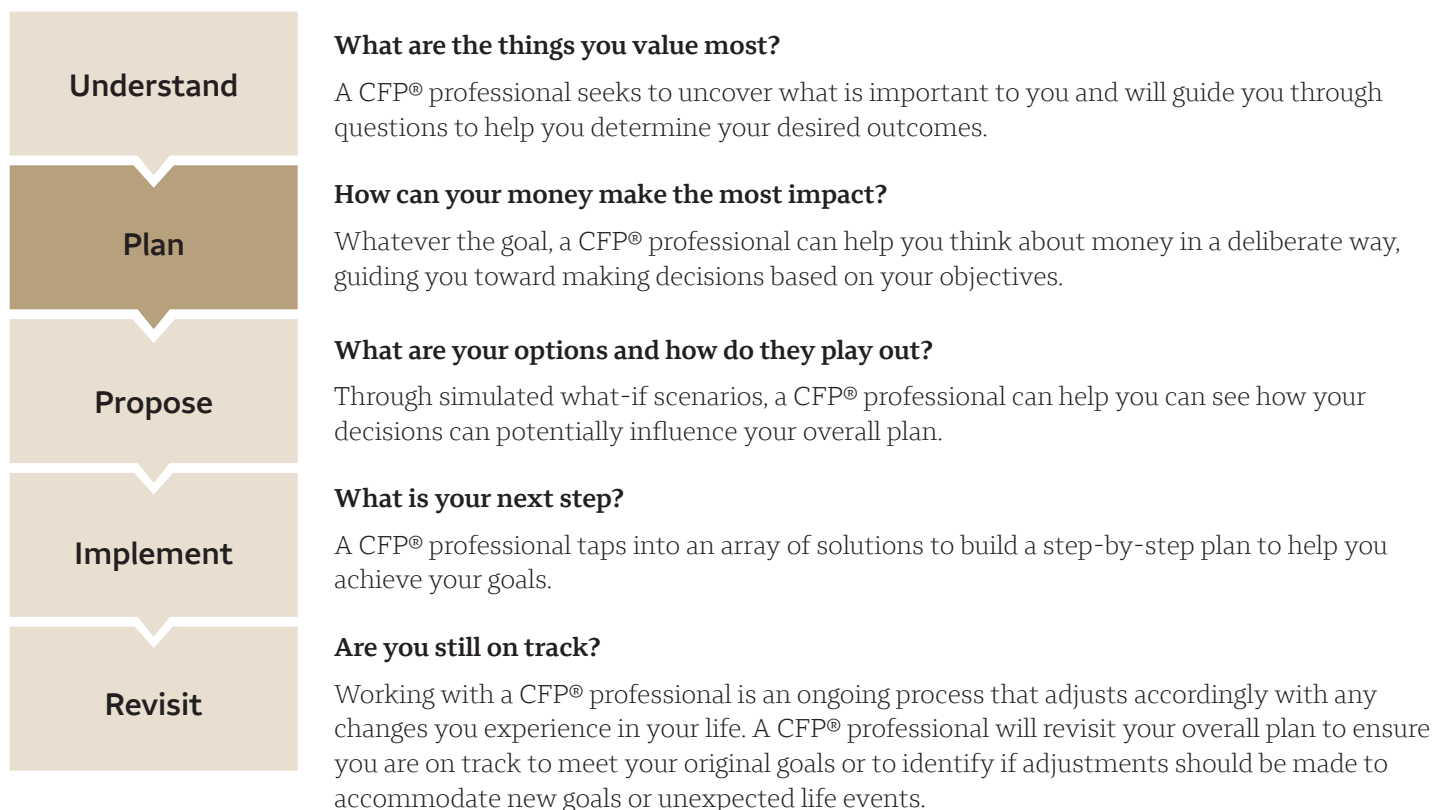
Giving your money purpose can empower you to spend it on what really matters to you. A CERTIFIED FINANCIAL PLANNER™ (CFP®) professional can guide you through our planning process, leading to meaningful conversations that help you clearly define and understand the “jobs” your money can do — whether that is making a major purchase, sending your children to college, or providing for a future lifestyle. A CFP® professional can help you explore a range

of scenarios while understanding the potential trade-offs required along the way.

A financial advisor with the CFP® certification has gone through training in advising on financial matters. They can provide a planning process to help align financial strategies with your desired outcomes and revisit scenarios on a regular basis to keep you on course.

What the process looks like

A CFP® professional can guide you through the planning process and advise on potential strategies that are tailored to your desired outcomes.



Qualifications of a CFP® professional

To earn the CFP® certification from the Certified Financial Planner Board of Standards, Inc., a financial advisor has met rigorous education, examination, experience, and ethics requirements as set forth by the Certified Financial Planner Board of Standards, Inc.

Education

Taking a comprehensive approach to meeting clients' financial needs, a financial advisor with the CFP® certification has completed training on nearly 100 integrated financial topics, including:

- General principles of financial strategies
- Insurance planning and risk management
- Employee benefits planning
- Retirement and estate planning

In addition to finishing the coursework on financial topics, the candidate is required to have earned a bachelor's degree (or higher) or its equivalent, in any discipline, from an accredited college or university.

What is the CFP Board?

The Certified Financial Planner Board of Standards, Inc. (CFP Board) establishes and enforces the education, examination, experience, and ethics requirements for CFP® certificants. Founded in 1985 as the International Board of Standards and Practices for Certified Financial Planners, Inc., the CFP Board is a professional regulatory organization that acts in the public interest by fostering professional standards in personal financial planning.

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and  in the United States, which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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