

SHOULD YOU TELL CLIENTS YOU'RE EARNING CFP® CERTIFICATION? **YES!**

You can't call yourself a CFP® professional or put it on your business cards until you have completed all the requirements for certification,¹ but you can still let your clients know about the work you're doing.

USE THESE KEY TALKING POINTS WITH YOUR CLIENTS:



1

Through the education coursework component of CFP® certification, you'll increase your knowledge in comprehensive financial planning. You'll be able to provide better advice about every area that affects their financial lives.



2

Your skills will be verified by a comprehensive exam, which will test your ability to apply your knowledge to real-life situations. Passing the rigorous exam proves that you are equipped to provide excellent advice.



3

You'll be committing to a fiduciary standard as a CFP® professional, meaning that you will commit to CFP Board to act in your clients' best interests at all times when you are providing financial advice.

At its core, all of this means that **CFP® certification will equip you to provide even better service to your clients.** You'll have the knowledge and experience to help them reach their financial goals, and they'll be able to feel confident as they trust your increased expertise.



CFP BOARD

Your commitment to achieving *the standard* for financial planning shows your clients that you are serious about your job and about doing it well.

THAT'S WORTH TALKING ABOUT.

1. You can call yourself a Candidate for CFP® Certification on your resume, cover letter and job applications if you have completed the education requirement within the past five years.