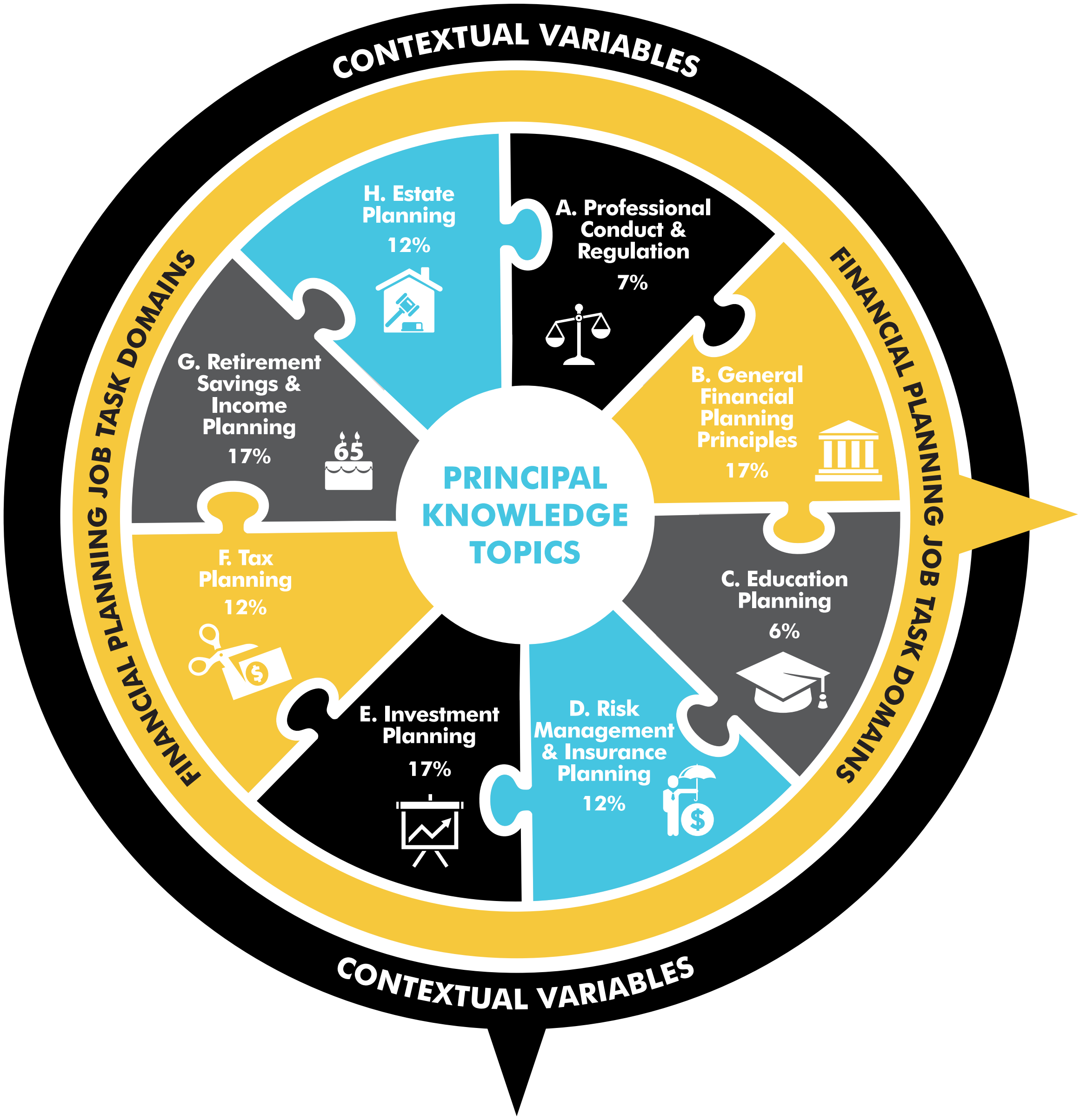
CFP BOARD

2015 JOB TASK ANALYSIS

EXAMINATION AND EDUCATION REQUIREMENTS



FINANCIAL PLANNING JOB TASK DOMAINS

1. Establishing & Defining the Client-Planner Relationship
2. Gathering Information Necessary to Fulfill the Engagement
3. Analyzing & Evaluating the Client's Current Financial Status
4. Developing the Recommendation(s)
5. Communicating the Recommendation(s)
6. Implementing the Recommendation(s)
7. Monitoring the Recommendation(s)
8. Practicing Within Professional & Regulatory Standards

CONTEXTUAL VARIABLES

FAMILY STATUS
Traditional family
Single parent
Same-sex couples
Blended families
Widowhood

NET WORTH
Ultra-high net worth
High net worth
Mass affluent
Emerging affluent
Mass market

INCOME LEVEL
High
Medium
Low

LIFE OR PROFESSIONAL STAGE
Student
Starting a career
Career transition
Pre-retirement
Retirement

OTHER CIRCUMSTANCES
Health issues
Divorce
Change of employment status
Aging parents
Special needs children