

CERTIFIED FINANCIAL PLANNER™ (CFP®) are licensed by the CFP® Board to use the CFP® mark. CFP® certification requirements include: Bachelor's degree from an accredited college or university, completion of the financial planning education requirements set by the CFP® Board ([www.cfp.net](http://www.cfp.net)), successful completion of the CFP® Certification Exam, comprised of two three-hour sessions, experience requirement: 6,000 hours of professional experience related to the financial planning process, or 4,000 hours of Apprenticeship experience that meets additional requirements, successfully pass the Candidate Fitness Standards and background check, agree annually to be bound by CFP® Board's Standards of Professional Conduct, and complete 30 hours of continuing education every two years, including two hours on the Code of Ethics and Standards of Professional Conduct.

The Certified Public Accountant (CPA) is the statutory title of qualified public accountants in the US who have passed the Uniform Certified Public Accountant Examination and have met additional state education and experience requirements. Certification is administered by each state.

The Accredited Investment Fiduciary® (AIF®) designation is granted by fi360, formerly known as the Center for Fiduciary Studies. Those who earn the AIF® mark, successfully complete a specialized program on investment fiduciary standards of care, pass a comprehensive examination and attest to a Code of Ethics.