



WANT TO BECOME A CFP™ PROFESSIONAL BY THE END OF 2020?

This timeline visualises the key dates and milestones you need to follow exactly in order to achieve the Level 7 Diploma in Advanced Financial Planning and become a CFP™ professional by the end of 2020, as long as you meet the entry requirements.

BECOME A PROFESSIONAL BY THE END OF 2020

Meet the entry requirements

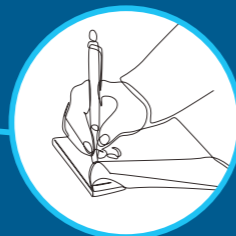
CISI Level 4 Investment Advice Diploma (Financial Planning & Advice) -OR- An RDR-compliant qualification for FCA Activities 4 and 6

Book your Level 6 Exam
and get your study materials by
1 December 2019
(to give you enough time to study)



STUDY

(Study support: workbook/
ebook, elearning videos,
Revision Express)



Sit the Level 6
Advanced Financial Planning Exam
Next Exam Sitting is 4 March 2020



Get your result
7 May 2020
...and pass!!



Register for the Level 7 Financial
Plan Case Study by 21 May 2020



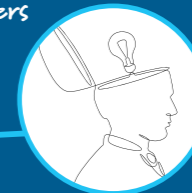
Submit your Case Study by
6 August 2020



Get your result
29 October 2020
...and pass!!



Become a CISI Member (MCSI)
and complete IntegrityMatters
(online ethics test)



Apply for CFP™ certification and
join over 181,000 CFP™ profes-
sionals globally (if you meet the
experience requirements)



December 2019

March 2020

May 2020

August 2020

October 2020

November 2020

Level 6 Certificate in Advanced Financial Planning

Level 7 Financial Plan Case Study

Apply for
CFP™ certification

Level 7 Diploma in Advanced Financial Planning

START YOUR JOURNEY TO BECOMING A CFP™ PROFESSIONAL TODAY

Click here to get started

Exam	Description	Key date
Level 6 Advanced Financial Planning	Deadline to book Level 6 Exam	5 January 2020
	Exam sitting date	4 March 2020
	Level 6 results released	7 May 2020
Level 7 Financial Plan Case Study	Deadline to book Level 7 Case Study	21 May 2020
	Case Study submission date	6 August 2020
	Level 7 results released	29 October 2020

For more information on the CFP™ pathway, visit cisi.org/cfp

If you have any questions about becoming a CFP™ professional, contact us at fpexams@cisi.org