CFP Exam Review

Welcome to Virtual Classroom: CFP® Exam Review

Live Online Classes for the November 2020 Exam

Classes Start August 2020

Our Virtual Classroom Series features 8 instructor-led classes designed to prepare you for the exam. Included as a core component of our Gold CFP Exam Review Courses, Wiley Virtual Classes are live online interactive CFP classes, delivered by top instructors, Colleen Carcone CFP, JD, and Chia-Li Chien, PhD, CFP, PMP, who have helped hundreds of students to pass the CFP exam.

Offering an overview and summary of the most relevant material as a way to reinforce key topics, identify learning objectives and goals for each session. Includes problem-solving, practice and assessment plus Q&A.

- Each class will last approximately 2-3 hours, including the lecture, worked problems, and Q&A
- Classes include a 10-20 minute break
- There are 8 classes
- An archive with class recordings will be made available for students unavailable to attend the live event so that you never miss a class!

Colleen Carcone

Chia-Li Chien

Date	Time (Eastern)	Class	Corresponding Course Content	Instructor	Assignment Hrs.	Exam Weight
August 6, 2020	8-9pm	New Student Orientation		Chia-Li Chien		
August 16, 2020	10am-1pm	CFP Class 1: General Principles of Financial Planning	Financial Planning Process Financial Statements Cash Flow Management Financing Strategies Economic Concepts Time Value of Money Concepts and Calculations Clint and Planner Attitudes, Values, Biases and Behavioral Finance Principles of Communication and Counseling Debt Management	Chia-Li Chien	5.5	17%
August 23, 2020	10am-1pm	CFP Class 2: Tax Planning	Fundamental Tax Law Income Tax Fundamentals and Calculations Characteristics and Income Taxation of Business Entities Income Taxation of Trusts and Estates Alternative Minimum Tax (AMT) Tax Reduction/Management Techniques Tax Consequences of Property Transactions Passive Activity and At-Risk Rules Tax Implications of Special Circumstances Charitable/Philanthropic Contributions and Deductions	Colleen Carcone	11.5	12%

*Timings, days and instructors are subject to change

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Date	Time (Eastern)	Class	Corresponding Course Content	Instructor	Assignment Hrs.	Exam Weight
August 30, 2020	10am-1pm	CFP Class 3: Professional Conduct and Regulation Education Planning	CFP Board's code of Ethics and Standards of Conduct CFP Board's Financial Planning Practice Standards CFP Board's Disciplinary Rules and Procedures Function, Purpose and Regulation of Financial Institutions Financial Services Regulations and Requirements Consumer Protection Laws Fiduciary Education Needs Analysis Education Savings Vehicles Financial Aid Gift/Income Tax Strategies Education Financing	Chia-Li Chien	10.5	13%
September 13, 2020	10am-1pm	CFP Class 4: Retirement Savings and Income Planning	Retirement Needs Analysis Social Security and Medicare Medicaid Types of Retirement Plans Qualified Plan Rules and Options Other Tax-Advantaged Retirement Plans Regulatory Considerations Key Factors Affecting Plan Selection for Businesses Distribution Rules and Taxation Retirement Income and Distribution Strategies Business Succession Planning	Chia-Li, Chien	17.5	17%
September 20, 2020	10am-1pm	CFP Class 5: Investment Planning	Characteristics, Uses and Taxation of Investment Vehicles Typs of Investment Risk Quantitative Investment Concepts Measures of Investment Returns Asset Allocation and Portfolio Diversification Bond and Stock Valuation Concepts Portfolio Development and Analysis Investment Strategies Alternative Investments	Chia-Li Chien	11.5	12%

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Date	Time (Eastern)	Class	Corresponding Course Content	Instructor	Assignment Hrs.	Exam Weight
September 27, 2020	10am-1pm	CFP Class 6: Risk Management and Insurance Planning	Principles of Risk and Insurance Analysis and Evaluation of Risk Exposures Health Insurance and Health Care Cost Management (Individual) Disability Income Insurance (Individual) Long-Term Care Insurance (Individual) Annuities Life Insurance (Individual) Business Uses of Insurance Insurance Needs Analysis Insurance Policy and Company Selection Property and Casualty Insurance	Chia-Li Chien	10	17%
October 4, 2020	10am-1pm	CFP Class 7: Estate Planning	Characteristics and Consequences of Property Titling Strategies to Transfer Property Estate Planning Documents Gift and Estate Tax Compliance and Tax Calculation Sources for Estate Liquidity Types, Features, and Taxation of Trusts Marital Deduction Intra-Family and Other Business Transfer Techniques Postmortem Estate Planning Techniques Estate Planning for Non-Traditional Relationships	Colleen Carcone	11	12%
November 3, 2020		Exam Week Opens				