CFP® Exam Review

Welcome to our CFP® Exam Review Virtual Classroom

Live Online Classes for the March 2021 Exam

Classes Start December 2021

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, our live online interactive CFP classes are 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 3 hours, including the lecture, worked problems, and Q&A
- Classes include a 10-20 minute break
- 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
December 8, 2020	8pm-9pm	New Student Orientation		Colleen Carcone		
December 15, 2020	7pm - 10pm	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 • Client and Planner Attitudes, Values, Biases and Behavioral Finance • Principles of Communication and Counseling • Debt Management	Chia-Li Chien	5.5	17%
December 22, 2020	7pm - 10pm	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 Contribu-tions 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
January 5, 2021	7pm - 10pm	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%
January 12, 2021	7pm - 10pm	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%
January 19, 2021	7pm - 10pm	Class 5: Investment Planning	• Characteristics, Uses and Taxation of Investment Vehicles • Types 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
January 26, 2021	7pm - 10pm	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%
February 2, 2021	7pm - 10pm	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%
March 9 - 11, 2021		Exam Week Windows				

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