



Pro Bono Boot Camp CE Instructions for CFP® professionals:

All CFP® professionals and FPA members volunteering as financial planners at Financial Planning Days are required to complete the Financial Planning Day Boot Camp designed to train and prepare volunteers for their participation.

The Boot Camp consists of a 50-minute [online presentation](#) and an accompanying handout attached. If the handout is not attached you may link to it here but you may need to request the password: [link to handout](#)

You are required to view the entire presentation as it contains important information to help you prepare and get the most out of your experience as a volunteer. After you view the presentation, you will have satisfied the volunteer Boot Camp requirement.

**Important note for CFP® professionals:**

CFP® professionals who complete the Boot Camp may qualify to receive 1 Continuing Education (CE) credit from CFP Board at no cost.

Only CFP® professionals who have not already received CE credit for this course in their current certification cycle are eligible to receive CE credit.

In order to receive the CE credit, you must pass an online exam testing your understanding of the content in the Boot Camp.

You will need your CFP Board ID Number and the code from the video. The exam is available [here](#).

We will notify you if you did not pass the exam. You are allowed to take the exam a maximum of two times. If you do not pass the exam on your second try, no CE will be awarded for this program.

The Foundation for Financial Planning will process the CE on your behalf with CFP Board and you will receive your credit as of the date you passed the exam.

Reports are sent to CFP Board twice a month. If your certification expires at the end of the current month, we encourage you to self-report the credit using CFP Board's website to avoid any penalties CFP Board may apply for not renewing your certification on time.

If you have any questions regarding the Pro Boot Camp, please contact [Noreenc@foundation-finplan.org](mailto:Noreenc@foundation-finplan.org).