

## PROFESSIONAL DESIGNATIONS

### MINIMUM QUALIFICATIONS REQUIRED FOR EACH DESIGNATION

#### **CFP® - Certified Financial Planner**

Issued by: Certified Financial Planner Board of Standards, Inc.

Prerequisites/Experience Required: Candidate must meet the following requirements:

- A bachelor's degree (or higher) from an accredited college or university, and
- 3 years of full-time personal financial planning experience

Educational Requirements: Candidate must complete a CFP-board registered program at an accredited university or hold one of the following:

- CPA
- ChFC
- Chartered Life Underwriter (CLU)
- CFA
- Ph.D. in business or economics
- Doctor of Business Administration
- Attorney's License

Examination Type: Two day, 10-hour CFP Certification Examination

Continuing Education Requirements: 30 hours every 2-years

Code of Ethics must be signed and adhered to.

#### **ChFC® - Chartered Financial Consultant**

Issued by: The American College

Prerequisites/Experience Required: 3 years of full-time business experience within the five years preceding the awarding of the designation.

Educational Requirements: 6 core and 2 elective courses.

Examination Type: Final proctored exam for each course.

Continuing Education Requirements: 30 hours of continuing education every 2 years.

Code of Ethics must be signed and adhered to.

#### **CLU®- Chartered Life Underwriter**

Issued by: The American College

Prerequisites/Experience Required: 3 years of full-time business experience within the five years preceding the awarding of the designation.

Educational Requirements: 5 core and 3 elective courses

Examination Type: Final proctored exam for each course

Continuing Education Requirements: 30 hours of continuing education every two years.

Code of Ethics must be signed and adhered to.

## **Enrolled Agent (EA)**

Issued by: Internal Revenue Service

Educational Requirements: None

Examination Type: Comprehensive, two day test administered by the Internal Revenue Service called the Special Enrollment Examination.

Continuing Education/Experience Requirements: 72 hours of continuing education credit over a 3-year period, with a minimum of 16 hours each year.

Code of Ethics must be signed and adhered to.

## **NAPFA (National Association of Personal Financial Advisors) Registered Financial Advisor**

Issued by: National Association of Personal Financial Advisors

Prerequisites/Experience Required: Candidate must meet all of the following requirements:

Have at least three years of comprehensive financial planning experience,

Provide investment and/or financial advice on a strictly Fee-Only basis,

Either possesses the CERTIFIED FINANCIAL PLANNER™ designation awarded by the Certified Financial Planner Board of Standards, Inc., or the American Institute of Certified Public Accountants' Personal Financial Specialist (CPA/PFS) credential,

Adhere to NAPFA's Fiduciary Oath, Standards of Membership and Affiliation, and Bylaws,

Educational Requirements: Bachelor's Degree

Examination Type: Have a sample comprehensive financial plan pass a peer review process.

Continuing Education Requirements: 60 hours of continuing education every two years

## **NAPFA Corporate Member**

LONGVIEW has a corporate membership with NAPFA that allows all members of the firm to participate in NAPFA sponsored activities