

Charter Financial Analyst (CFA)

Prerequisites

Candidates must:

1. meet one of the following requirements prior to enrollment in the CFA Program:
 - hold a bachelor's or equivalent degree from a college/university;
 - be within 11 months of the graduation month for a bachelor's degree or equivalent program by the date of sitting for the Level I exam; or
 - have a combination of 4,000 hours of work experience and/or higher education that was acquired over a minimum of three sequential years by the date of enrolling for the Level I exam;
2. have 4,000 hours of qualified work experience in the investment decision-making process (accrued before, during, or after participation in the CFA Program); **and**
3. submit two-to-three professional reference letters.

Exam Type

Three in-person, proctored, closed-book, computer-based exams

Certified Exit Planning Advisor (CEPA)

Prerequisites

Candidates must meet all the following requirements:

- have five years of full-time or equivalent experience working directly with business owners as a financial advisor, attorney, CPA, business broker, investment banker, commercial lender, estate planner, insurance professional, business consultant or in a related capacity;
- have an undergraduate degree from a qualifying institution or additional professional work experience (two years of relevant professional experience may be substituted for each year of required undergraduate studies); and

- be an Exit Planning Institute member in good standing.

Exam Type

Online, proctored, closed book final exam