

An Accelerated 8-Week Self-Study Plan for the CFP® Certification Examination Using Keir's Comprehensive Review Materials

This is a **Guide** only.

The purpose of this accelerated study plan is to give CFP® Certification Examination candidates a general ideal of how much material they should cover each day to review all of the Keir CFP materials in an 8-week period. For the non-accelerated study plan, please refer to the 12-week schedule.

We do not (on purpose) give a suggested amount of time to spend each day. Most students find that this will vary from four to six hours per day (a total of 200 to 300 hours to adequately prepare for the exam). The critical recommendation is: "Do not allow work to pile up. Do not put off completing a lesson without a serious reason."

Some things that may alter your pace:

- ✓ **Unclear Concept:** If you find a concept unclear after spending a reasonable amount of time, call customer service at Keir during normal business hours. We will have an answer for you or have an instructor call you back within 24 hours or less. You can reach customer service at 800-795-5347, or e-mail your questions to our instructors at fpquestions@keirsuccess.com.
- ✓ **Already Understand Topic:** You may need to spend less time on it, but make sure you are scoring 75% or better on the questions.
- ✓ **Unfamiliar with Topic:** There will be topics in the materials with which you are not as familiar. You will need to spend more time on these topics.
- ✓ **Family/Personal Emergency:** You may need to reschedule both your study time and/or exam time.

Key Concepts built into this agenda:

- (1) You must read all topics in the two-volume summary review books.
- (2) You must answer all application questions in the two-volume summary review books and all cases in the Case Studies Book (and score at least 75% on them).
- (3) You purchased the Essential Keys for CFP® Certification Examination Success Book, comprehensive exam software, and flashcards. If you did not order these items, you will have less to study some days.
- (4) You must take the entire 10-hour Simulated Examination one week prior to the exam.
- (5) Setting regular study hours over a period of time is better than putting off studying and cramming at the last minute.
- (6) Let ideas sink in. The curriculum does not call for study on Sundays (or any other **one** day of your choosing each week). This will allow time for that week's topics to sink in.

As long as you accomplish these six items, you may adjust the agenda to fit your life – and study styles.

We at Keir wish you the best of luck studying for the exam. You can always reach us for questions regarding the content of our materials on Monday through Friday from 9 AM ET to 5 PM ET. Please call us at 800-795-5347 or send us an e-mail message at customerservice@keirsuccess.com. Remember, Keir will get you through!

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Week 1	Assignment	Supplemental Study Material (if purchased)
Monday	Take PACER Examination on Keir's Web site Read Financial Planning ✓ Topics 1, 2, 3, 4, and 5 Answer all Application Questions	Read Essential Keys ✓ Topics 1, 2, 3, 4, and 5
Tuesday	Read Financial Planning ✓ Topics 6, 7, 8, 9, and 10 Answer all Application Questions	Read Essential Keys ✓ Topics 6, 7, 8, 9, and 10
Wednesday	Read Financial Planning ✓ Topics 11, 12, 13, and 14 Answer all Application Questions Read Time and Money ✓ Chapter 1, 2, and 3	Read Essential Keys ✓ Topics 11, 12, 13, and 14
Thursday	Read Insurance Planning ✓ Topics 15, 16, 17, 18, 19, and 20 Answer all Application Questions	Read Essential Keys ✓ Topics 15, 16, 17, 18, 19, and 20
Friday	Read Insurance Planning ✓ Topic 21, 22, 23, 24, 25, and 26 Answer all Application Questions	Read Essential Keys ✓ Topics 21, 22, 23, 24, 25, and 26
Saturday	Review Financial Planning ✓ Topics 1 – 14 Review Insurance Planning ✓ Topics 15 – 26, Including Application Questions	Flip through flashcards ✓ Financial Planning ✓ Insurance Planning Answer Financial Planning and Insurance Planning Questions on CD (or online) ✓ As many as possible

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Week 2	Assignment	Supplemental Study Material (if purchased)
Monday	Read Employee Benefits Planning ✓ Topics 27, 28, 29, 30, 31, 32, and 33 Answer all Application Questions	Read Essential Keys ✓ Topics 27, 28, 29, 30, 31, 32, and 33
Tuesday	Read Investment Planning ✓ Topics 34 and 35 Answer all Application Questions	Read Essential Keys ✓ Topics 34 and 35 Flip through flashcards ✓ Financial Planning ✓ Insurance Planning
Wednesday	Read Investment Planning ✓ Topics 36, 37, and 38 Answer all Application Questions	Read Essential Keys ✓ Topics 36, 37, and 38
Thursday	Read Investment Planning ✓ Topics 39 and 40 Answer all Application Questions	Read Essential Keys ✓ Topics 39 and 40
Friday	Read Investment Planning ✓ Topic 41, 42, and 43 Answer all Application Questions	Read Essential Keys ✓ Topics 41, 42, and 43 Flip through flashcards ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning
Saturday	Review Employee Benefits Planning ✓ Topics 27 – 33 Review Investment Planning ✓ Topics 34 – 43, Including Application Questions	Flip through flashcards ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning Answer Investment Questions on CD (or online) ✓ As many as possible

Online review course starts this week. Please see Study Tips-12 for details.

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Week 3	Assignment	Supplemental Study Material (if purchased)
Monday	Read Income Tax Planning ✓ Topics 44, 45, and 46 Answer all Application Questions	Read Essential Keys ✓ Topics 44, 45, and 46
Tuesday	Read Income Tax Planning ✓ Topics 47, 48, and 49 Answer all Application Questions	Read Essential Keys ✓ Topics 47, 48, and 49
Wednesday	Read Income Tax Planning ✓ Topics 50, 51, and 52 Answer all Application Questions	Read Essential Keys ✓ Topics 50, 51, and 52 Flip through flashcards ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning
Thursday	Read Income Tax Planning ✓ Topics 53, 54, and 55 Answer all Application Questions	Read Essential Keys ✓ Topics 53, 54, and 55
Friday	Read Income Tax Planning ✓ Topics 56, 57, and 58 Answer all Application Questions	Read Essential Keys ✓ Topics 56, 57, and 58
Saturday	Review Income Tax Planning ✓ Topics 44 – 58, Including Application Questions	Flip through flashcards ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning ✓ Income Tax Planning Answer Income Tax Questions on CD (or online) ✓ As many as possible

**Live review courses start this week across the U.S.
Please see Study Tips-13 through Study Tips-14 for details.**

Editor's Note: Students should complete Volumes 1 and 2 before attending the live review class. It typically takes students up to 100 hours to complete both books.

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Week 4	Assignment	Supplemental Study Material (if purchased)
Monday	Read Retirement Planning ✓ Topics 59, 60, and 61 Answer all Application Questions	Read Essential Keys ✓ Topics 59, 60, and 61
Tuesday	Read Retirement Planning ✓ Topics 62 and 63 Answer all Application Questions	Read Essential Keys ✓ Topics 62 and 63
Wednesday	Read Retirement Planning ✓ Topics 64 and 65 Answer all Application Questions	Read Essential Keys ✓ Topics 64 and 65
Thursday	Read Retirement Planning ✓ Topics 66 and 67 Answer all Application Questions	Read Essential Keys ✓ Topics 66 and 67 Flip through flashcards ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning ✓ Income Tax Planning ✓ Retirement Planning
Friday	Review Retirement Planning ✓ Topics 59 – 67, Including Application Questions	Flip through flashcards ✓ Retirement Planning Answer Retirement Plan Questions on CD (or online) ✓ As many as possible
Saturday	Read Estate Planning ✓ Topics 68, 69, and 70 Answer all Application Questions	Read Essential Keys ✓ Topics 68, 69, and 70

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Week 5	Assignment	Supplemental Study Material (if purchased)
Monday	Read Estate Planning ✓ Topics 71, 72, and 73 Answer all Application Questions	Read Essential Keys ✓ Topics 71, 72, and 73
Tuesday	Read Estate Planning ✓ Topics 74, 75, 76, and 77 Answer all Application Questions	Read Essential Keys ✓ Topics 74, 75, 76, and 77
Wednesday	Read Estate Planning ✓ Topics 78, 79, 80, and 81 Answer all Application Questions	Read Essential Keys ✓ Topics 78, 79, 80, and 81 Flip through flashcards ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning ✓ Income Tax Planning ✓ Retirement Planning
Thursday	Read Estate Planning ✓ Topics 82, 83, 84, and 85 Answer all Application Questions	Read Essential Keys ✓ Topics 82, 83, 84, and 85
Friday	Read Estate Planning ✓ Topics 86, 87, 88, and 89 Answer all Application Questions	Read Essential Keys ✓ Topics 86, 87, 88, and 89
Saturday	Review Estate Planning ✓ Topics 71 – 89, Including Application Questions	Flip through flashcards ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning ✓ Income Tax Planning ✓ Retirement Planning ✓ Estate Planning Answer Estate Planning Questions on CD (or online) ✓ As many as possible

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Week 6	Assignment	Supplemental Study Material (if purchased)
Monday	Answer Case Questions <ul style="list-style-type: none"> ✓ Financial Planning ✓ Insurance Planning ✓ Employee Benefits 	Read Essential Keys <ul style="list-style-type: none"> ✓ Financial Planning (Topics 1 – 14) ✓ Insurance Planning (Topics 15 – 26) ✓ Employee Benefits (Topics 27 – 33)
Tuesday	Answer Case Questions <ul style="list-style-type: none"> ✓ Investment Planning ✓ Income Tax Planning 	Read Essential Keys <ul style="list-style-type: none"> ✓ Investment Planning (Topics 34 – 43) ✓ Income Tax Planning (Topics 44 – 58)
Wednesday	Answer Cases Questions <ul style="list-style-type: none"> ✓ Retirement Planning ✓ Estate Tax Planning 	Read Essential Keys <ul style="list-style-type: none"> ✓ Retirement Planning (Topics 59 – 67) ✓ Estate Tax Planning (Topics 68 – 89)
Thursday	Review your weakest areas <ul style="list-style-type: none"> ✓ Topics 1 – 89 Answer Comprehensive Cases <ul style="list-style-type: none"> ✓ Dan and Laura Bajadali Case ✓ Ed and Carol Callsen Case ✓ Robert and Mary Jones Case ✓ Ron and Sandy Revak Case 	Flip through flashcards <ul style="list-style-type: none"> ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning ✓ Income Tax Planning ✓ Retirement Planning ✓ Estate Planning
Friday	Review your weakest areas <ul style="list-style-type: none"> ✓ Topics 1 – 89 Answer Published Case Scenarios <ul style="list-style-type: none"> ✓ Matthews Case ✓ Kincaid Case ✓ Clarke Case ✓ 2004 Released Case Scenario (12 questions on the Susan Davis case plus 28 other stand-alone questions)	
Saturday	Answer Practice Exam Questions at the end of the Case Studies Book <ul style="list-style-type: none"> ✓ Questions 1 – 102 	Flip through flashcards <ul style="list-style-type: none"> ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning ✓ Income Tax Planning ✓ Retirement Planning ✓ Estate Planning

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Week 7	Assignment	Supplemental Study Material (if purchased)
Monday	Take Keir's After-Study Assessment Exam on Keir's Web site Review your weakest areas ✓ Topics 1 – 89 Review Application Questions	Review your weakest areas by reading those topics in the Essential Keys
Tuesday	Review questions on your weakest areas ✓ Cases	Review questions on your weakest areas ✓ CD (or online)
Wednesday	Review your weakest areas ✓ Topics 1 – 89 Review Application Questions	Review your weakest areas by reading those topics in the Essential Keys
Thursday	Review questions on your weakest areas ✓ Cases	Flip through flashcards ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning ✓ Income Tax Planning ✓ Retirement Planning ✓ Estate Planning
Friday	Take Simulated Examination and read Answers after completing the entire session ✓ Session 1	
Saturday	Take Simulated Examination and read Answers after completing the entire session ✓ Session 2 ✓ Session 3	Flip through flashcards ✓ Financial Planning ✓ Insurance Planning ✓ Investments Planning ✓ Income Tax Planning ✓ Retirement Planning ✓ Estate Planning

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Week 8	Assignment	Supplemental Study Material (if purchased)
Monday	Review your weakest areas ✓ Topics 1 – 89 Review Application Questions	Review your weakest areas by reading those topics in the Essential Keys
Tuesday	Review questions on your weakest areas ✓ Cases	Review questions on your weakest areas ✓ CD (or online)
Wednesday	Review your weakest areas ✓ Topics 1 – 89 Review Application Questions	Flip through flashcards ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning ✓ Income Tax Planning ✓ Retirement Planning ✓ Estate Planning
Thursday	Review your weakest areas ✓ Topics 1 – 89 Review Application Questions Stop studying by dinner ✓ Get a good night's sleep	Review your weakest areas by reading those topics in the Essential Keys
Friday	Take CFP® Certification Examination ✓ Get a good night's sleep	Flip through flashcards in morning ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning ✓ Income Tax Planning ✓ Retirement Planning ✓ Estate Planning
Saturday	Take CFP® Certification Examination ✓ Go out to dinner to celebrate completing the exam	Flip through flashcards in morning ✓ Financial Planning ✓ Insurance Planning ✓ Investment Planning ✓ Income Tax Planning ✓ Retirement Planning ✓ Estate Planning

Keir Study Tips

What Keir Students Are Saying About Our Review Program for the CFP® Certification Examination

Thank you Keir for “getting me through!”

- John

...In addition to the study materials, which helped to bring things together, and from which I learned a lot, I really appreciated the phone call the week of the test. I felt as though I were about a week behind in study/retention time, and that phone call really helped me focus my energy that last week, as well as to manage my emotions.

- Rebecca

...The study guides and CD-ROM questions were wonderful. I found the information in the guides to be well written and the examples excellent. Your materials made the difference in allowing me to pass the exam. I have and will continue to recommend your wonderful product.

- Mike

...I don't believe I would have passed the board exam without the Keir material, specifically the case studies book and the mock exams.

- Ben

...I believe my participation in the “Online Review” course to be a major factor in my recent success. The support was exceptional. Thank you.

- Deborah

...The course was worth every penny. The live review “brought it all together” for me and gave me focus in my studies leading up to the exam.

- Jeff

...I know I would not have passed this test without the Keir materials, and especially without the live review.

- Susan