

Professional Designations

CFP® – Certified Financial Planner™

This is a professional designation related to financial planning. In order to earn a CFP® designation, a financial professional must have a bachelor's degree and three years of previous experience, complete the education requirements of the CFP® Board, pass the CFP® exam, and meet continuing education requirements.

ChFC® – Chartered Financial Consultant®

This is a professional designation related to financial planning. In order to earn a ChFC®, a financial professional must have three years of previous experience, take and pass nine courses in a variety of financial planning areas, and meet continuing education requirements.

CLU® - Chartered Life Underwriter

A chartered life underwriter, or CLU, is a financial services certification for financial advisors who specialize in life insurance within the context of estate planning. Although many advisors have experience with estate planning, CLUs go through rigorous training to earn this designation.

AIF® – Accredited Investment Fiduciary

The Accredited Investment Fiduciary (AIF) is an ethical certification issued by Fi360. That body is sometimes known by its former name, the Center for Fiduciary Studies.

An AIF has completed Fi360's course on ethical behavior and fiduciary services. The advisors have learned to balance their business interests against a client-first (or fiduciary) approach.

CEPA® – Certified Exit Planning Advisor

The CEPA program, created in 2007 by the Exit Planning Institute, is an in-person, MBA-style program. To become a certified exit planning advisor, candidates must have at least five years of full-time or equivalent experience working directly with business owners. Most CEPAs come from the banking or insurance industries, or are accountants, estate planners or lawyers. Candidates must either have an undergraduate degree or additional relevant work experience. They must also be a member of the Exit Planning Institute in good standing.