
CFP Board to publish its first financial planning handbook

By Editor Test Sun, Jul 15, 2012

"The financial planning profession has long needed a book that encompasses not just the tactical pieces of putting together a financial plan, but also the academic underpinnings of a growing discipline," said CFP Board CEO Kevin R. Keller, CAE.

Certified Financial Planner Board of Standards, Inc., which grants the CFP designation, announced that it will publish the first "competency handbook for financial planning" in March 2013. The publisher will be John Wiley & Sons.

The handbook will feature approximately 90 chapters that have implications for practitioners, educators and students interested in becoming personal financial planners. The handbook will also be available as an e-book on all major e-readers.

"The financial planning profession has long needed a book that encompasses not just the tactical pieces of putting together a financial plan, but also the academic underpinnings of a growing discipline," said CFP Board CEO Kevin R. Keller, CAE.

According to a release, "the *Financial Planning Competency Handbook* will discuss the theoretical content, actions, and contexts that are necessary in financial planning practice. [It will] provide a theoretical framework for many of the major content areas in financial planning, while also providing real-world guidance for practicing professionals.

"It will also contain competency levels relative to financial planning practice as well as avenues for furthering student achievement in financial planner preparation programs. There will also be more than 100 vignettes that outline specific contexts in financial planning practice as well as the necessary decisions and actions of the practitioner within those settings."

© 2012 RIJ Publishing LLC. All rights reserved.