



CFP® certification education review courses

Live instruction + On Demand

Instructor-led, live-online classes designed by previous CFP® Board of Examiners members — all recorded for On Demand Review.

Textbooks (print or eBook)

A well-written, complete and up-to-date program presented in the right order with the right topic emphasis to maximize preparedness. *Please note that print versions come with an additional cost.*

Review readiness

Study materials and tests that provide a clear answer on the hardest question of all — “Am I ready?”

Exam readiness predictor

Proven predictions of the chance you’ll pass based on performance during the Review Readiness tests.

Question bank, mini-cases and cases

Extra test questions and scenarios built to increase understanding and reinforce learning through repetition.

Mock exams

Trial runs that mimic all aspects of the actual CFP® exam, so by the time learners get to the real thing, the pressure’s off.

Live office hours

Answers to your questions and advice from some of the best in the business — all in an individual setting.

Calculator book

The tips and tricks you need to save time and make sure your calculations are correct during the CFP® exam.

Digital flashcards

A proven method of quick study to help recall the many concepts and definitions covered in the CFP® exam.

Individual coaching

One-on-one advice about what to study less, what to study more and an overall idea of when learners might be ready.

Supplemental lectures

A bank of video study material to reinforce learning by hearing the same thing several times, but in different ways.

Supplemental Q/A lectures

Practice study questions that test knowledge and eliminate the possibility of surprises.

100% money-back guarantee

Full refund if you don’t pass. Although, we know you will.

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The Dalton Review®

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