

PROFESSIONAL DESIGNATIONS

MINIMUM QUALIFICATIONS REQUIRED FOR EACH DESIGNATION

CFP® - Certified Financial Planner

Issued by: [Certified Financial Planner Board of Standards, Inc.](#)

Prerequisites/Experience Required: Candidate must meet the following requirements:

- A bachelor's degree (or higher) from an accredited college or university, and
- 3 years of full-time professional experience in the financial planning process or 2 years of apprenticeship experience that meets additional requirements.

Educational Requirements: Candidate must complete a CFP-board registered program at an accredited university or hold one of the following and complete a capstone course:

- CPA
- ChFC
- Chartered Life Underwriter (CLU)
- CFA
- Ph.D. in business or economics
- Doctor of Business Administration
- Attorney's License

Examination Type: Two day, 10-hour CFP Certification Examination

Continuing Education Requirements: 30 hours every 2-years

Code of Ethics must be signed and adhered to.

ChFC® - Chartered Financial Consultant

Issued by: [The American College](#)

Prerequisites/Experience Required: 3 years of full-time business experience within the five years preceding the awarding of the designation.

Educational Requirements: 6 core and 2 elective courses.

Examination Type: Final proctored exam for each course.

Continuing Education Requirements: 30 hours of continuing education every 2 years.

Code of Ethics must be signed and adhered to.

CLU®- Chartered Life Underwriter

Issued by: The American College

Prerequisites/Experience Required: 3 years of full-time business experience within the five years preceding the awarding of the designation.

Educational Requirements: 5 core and 3 elective courses

Examination Type: Final proctored exam for each course

Continuing Education Requirements: 30 hours of continuing education every two years.

Code of Ethics must be signed and adhered to.

Enrolled Agent (EA)

Issued by: Internal Revenue Service

Educational Requirements: None

Examination Type: Comprehensive, two day test administered by the Internal Revenue Service called the Special Enrollment Examination.

Continuing Education/Experience Requirements: 72 hours of continuing education credit over a 3-year period, with a minimum of 16 hours each year.

Code of Ethics must be signed and adhered to.

CPWA®- Chartered Private Wealth AdvisorSM

Issued by: Investment Management Consultants Association®

Prerequisites/Experience Required: 5 years of full-time professional client-centered experience in financial services or a related industry

Educational Requirements: 6-month self-study program, followed by 5 days in class at The University of Chicago Booth School of Business

Examination Type: Final comprehensive exam

Continuing Education Requirements: 40 hours of continuing education every two years

Code of Ethics must be signed and adhered to.

NAPFA (National Association of Personal Financial Advisors) Registered Financial Advisor

Issued by: National Association of Personal Financial Advisors

Prerequisites/Experience Required: Candidate must meet all of the following requirements:

Have at least three years of comprehensive financial planning experience,

Provide investment and/or financial advice on a strictly Fee-Only basis,

Possess the CERTIFIED FINANCIAL PLANNER™ designation awarded by the Certified Financial Planner Board of Standards, Inc.,

Adhere to NAPFA's Fiduciary Oath, Standards of Membership and Affiliation, and Bylaws,

Educational Requirements: Bachelor's Degree

Examination Type: Have a sample comprehensive financial plan pass a peer review process.

Continuing Education Requirements: 60 hours of continuing education every two years

NAPFA Corporate Member

LONGVIEW has a corporate membership with NAPFA that allows all members of the firm to participate in NAPFA sponsored activities