



CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

CFP® Certification Examination: Testing Accommodations Request Form

CFP Board is committed to ensuring access to the CFP® Certification Examination for all individuals with disabilities and supports the intention of the Americans with Disabilities Act as Amended (ADAAA). CFP Board provides reasonable and appropriate accommodations to individuals with documented disabilities who demonstrate a need for testing accommodations. For example, applicants may request a separate testing room, extra testing time, or presentation of the material in large font. Requests for testing accommodations are inherently individualized and considered on a case-by-case basis. Consequently, no single type of accommodation will necessarily be appropriate for all individuals with disabilities. Simply demonstrating that an individual meets diagnostic criteria for a particular disorder does not mean that person is automatically entitled to testing accommodations.

The purpose of testing accommodations is to provide those seeking to attain CFP® certification with an opportunity to have full access to the exam. However, testing accommodations are not a guarantee of improved performance or exam completion.

To request testing accommodations during an administration of the CFP® exam, the Exam Applicant and a qualified evaluator must complete the following form and return it to CFP Board along with the required documentation.

Please note that testing accommodation requests must be submitted to CFP Board no later than the Education Verification Deadline. Testing accommodation requests will be reviewed once your exam application and exam fee have been received by CFP Board.

Guidelines with additional instructions regarding the required qualifications for evaluators and the required documentation are attached to the end of this form.

Please print or type the information requested on this form.

SECTION I: Exam Applicant's Information

Exam Applicant's Name: _____

CFP Board ID: _____

Anticipated Exam Date: _____ Registration Deadline: _____

SECTION II: Accommodations Requested

Please indicate the accommodation(s) you are requesting. *(This section to be completed by the exam applicant in consultation with diagnosing professional.)*

- **Extended Time: Standard Time + 50% (Total: 9 hours)**
(Session 1: Test 4.5 hours; Session 2: Test 4.5 hours)
- **Additional 30-minute break per testing sessions (Total: 7 hours)**
(Session 1: Test 3.5 hours; Session 2: Test 3.5 hours)
- **Scribe**
- **Private Room**
- **Other** *(Please provide description):* _____

Please provide rationale as to why your requested accommodation is needed:

Section III: Authorization for Release of Information

I grant permission to school officials and my healthcare provider(s) to release my education-related records and/or my medical or psychological records to CFP Board and its designee in connection with my request for testing accommodations.

Signature of Applicant: _____ Date: _____

Section IV: Diagnosing Professional's Information

Name: _____ Phone: _____

Highest Degree and Area of Specialization: _____

License Number: _____ Expiration Date: _____

Issuing State/Province/Territory: _____

Section V: Diagnosing Professional's Assessment

Name of the disorder(s) for which the above-named Exam Applicant has requested accommodations:

Date of most recent assessment of the
above-named Exam Applicant: _____

Section VI: Required Documentation

Testing accommodation requests must be accompanied with documentation from a qualified diagnostic professional demonstrating a current, comprehensive medical, psychiatric, or psychological evaluation, including detailed letter(s) or report(s) from the evaluator that meet the minimum format, currency and content requirements outlined below.

For detailed information on diagnostic professional qualifications and required documentation, please consult the following Guidelines in Section VII of this form.

Please email or fax requests and documentation to:

examinations@cfpboard.org

Fax: 202-379-2299

Please note that Testing Accommodation Requests are time-sensitive so it is preferred that candidates send the documentation via **email or fax** for review.

SECTION VII: Submission Instructions

The following guidelines are provided for the evaluators who prepare documentation for Exam Applicants as part of their request for testing accommodations for the CFP® Certification Examination. Exam Applicants requesting testing accommodations are asked to share these guidelines with their evaluator so that appropriate documentation can be assembled to support the request for testing accommodations.

Qualifications of Diagnosing Professional

A qualified professional must perform the evaluation. The diagnosing professional's name, title, and professional credentials must be clearly stated in the documentation.

- For a professional to be deemed qualified to assess an individual for ADHD, psychiatric or psychological disability, that professional must have had extensive graduate-level training in the area of psychiatric or psychological assessment of adults. In most cases, the evaluator should have a M.D., Ph.D., or Psy.D. degree.
- For a professional to be deemed qualified to assess an individual for a physical or health-related disability, that professional must have had extensive graduate-level training in the area of medical assessment of adults. In most cases, the evaluator should have an M.D., O.D., or D.O. degree.
- For a professional to be deemed qualified to assess an individual for learning disorders, administering a neuropsychological or psychoeducational evaluation, that professional must have had extensive graduate-level training in the area of assessment of learning disabilities with adults. This usually includes formal education and training in the history, nature, identification, and remediation of learning disabilities.
- CFP Board reserves the right to request evidence of an evaluator's professional qualifications. CFP Board will not accept any assessment completed by a member of the Exam Applicant's family, even if that family member is otherwise qualified.
- If a graduate-trainee clinician is conducting some or all of the evaluation (for example, as part of a university-based assessment practicum), CFP Board will consider the results only if both the graduate-trainee clinician and the faculty supervisor sign the written report. CFP Board reserves the right to contact the faculty supervisor and/or the graduate-trainee clinician to inquire about the level of supervision provided during the assessment.

Format Requirements

The evaluation must be printed on the diagnostic professional's letterhead and be signed by the diagnostic professional.

Currency Requirements

The diagnostic professional's evaluation must be completed within the relevant timeframe(s) outlines below:

- No more than **1 Year** prior to anticipated CFP® exam date for physical disabilities, chronic health conditions, psychological and psychiatric disorders.
- No more than **5 Years** prior to anticipated CFP® exam date for attention-deficit/hyperactivity disorder, learning and other cognitive disorders

Required Documentation

Testing accommodation requests must be accompanied with documentation from a qualified diagnostic professional demonstrating a current, comprehensive medical or psychiatric or psychological evaluation. In situations where an individual is thought to have two or more disorders, such as a learning disability and a visual impairment, the diagnostic report must clearly describe the unique impact of each disorder, and documentation requirements must be met for each disorder.

The documentation must be provided through a detailed letter and/or report(s) from the evaluator that meet the minimum format, currency and content requirements outlined below.

Content Requirements

The evaluation must include:

- A clear and specific diagnosis, with evidence that all diagnostic criteria for the disorder have been met, and confirmation that the symptoms are not due to other disorders, such as an emotional disorder, physical disorder, or English-as-a second-language (ESL) factors.
- Please note that meeting diagnostic criteria for a particular disorder does not necessarily mean that the individual will be found to be disabled as defined by the ADA. In order to be found to be disabled, an individual must be substantially limited, in a major life activity, as compared with most people in the general population.
- The history of the Exam Applicant's impairment, including the age that the symptoms of the disorder/condition first appeared, the age of first diagnosis, and a history of the impact of the disorder/condition.
 - a. Age that symptoms of the disorder first appeared
 - b. Educational history
 - c. Psychosocial history
 - d. Relevant medical history
 - e. History of the condition
 - f. History of the impact of the condition (not just past use of testing accommodations)
 - g. Summary of medical or psychological test results (if any)
- The current impact of the disorder/condition on the Exam Applicant's academic functioning, employment (if relevant), and other activities of daily living.
- The current functional limitations likely to affect the Exam Applicant's ability to take the CFP® exam under standard conditions.
- Specific recommendations for testing accommodations, with a specific rationale for each requested accommodation.

Examples of specific recommendations for testing accommodations may include 50% extra testing time, large font, or testing in a separate room. Non-specific recommendations such as "extra time" or "the maximum allowable time" are not acceptable. Please note that the purpose of extra time is not to ensure that the individual finishes the CFP® exam.

Questions?

Contact CFP Board's Examinations Department at 800-487-1497 or examinations@cfpboard.org.