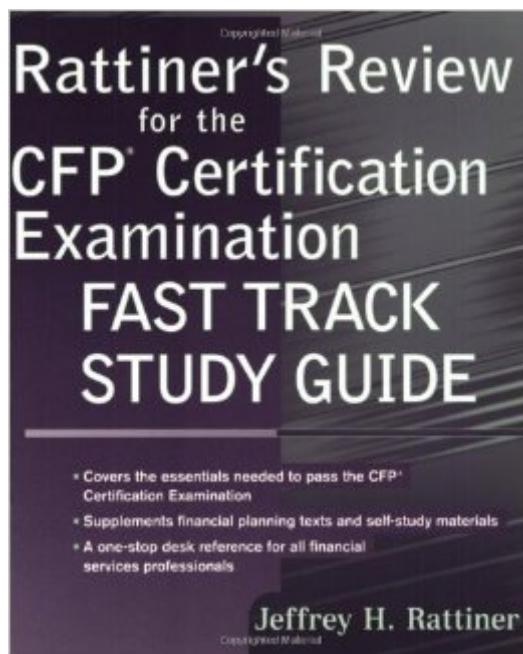


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# Rattiner's Review For The CFP® Certification Examination, Fast Track Study Guide



## Synopsis

A CFP® Study Guide that delivers what you need to succeed! This quick study guide for candidates preparing to take the CFP® Certification Examination covers the bare-bones essentials needed to pass this challenging exam in a logical and easy-to-absorb manner. Covering some of the most important disciplines of financial planning—insurance, employee benefit, investment, income tax, retirement, estate, and general planning—this text provides a no-nonsense approach to studying that includes: A highly logical and efficient format An in-depth outline of core essentials Explanations of all relevant exposures complete with solutions and practical examples Key points, exam tips, multiple choice, and mini “case study questions Mnemonic devices and study techniques to reinforce key points A format that directly parallels the CFP Board™s topic requirements and more! Order your copy today!

## Book Information

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## Customer Reviews

I recently spent a bunch of money to take one of the several well established review courses. I purchased this book since it was relatively inexpensive and I thought I would check out the materials as a portable outline. The book has not been updated since 2003. So much of the material is outdated!! Big problem!!! Need I say more! Further, doesn't have a worthy return policy since I purchased this. I might change my review if the price were \$5 because it isn't worth anymore. Avoid Avoid

This book is an incredibly detailed outline covering the vast selection of topics included on the CFP

exam. Because of the outline format, I wouldn't recommend trying to use this book as a way to learn material for the first time. What it is ideal for is as a reminder of details and distinctions, improving your recall of topics learned in some prior class or self-study, but in much more detail. Because this book is updated each year, it references up-to-date tax dollar amounts you'll need for the exam.

The book is written in an outline format. In this case, the outline format completely fails due to the author's apparent lack of ability to properly categorize subject matter and repeated criss-crossing of topics in incorrect sections. Poor organization is bad, but not fatal to test prep materials. What cannot be forgiven is the copious amount of incorrect information contained in this study guide. As a CPA and a lawyer, I have experience in the financial arena and I clearly recognize when information is just plain wrong. At first, I challenged my preconceptions by researching topics where the outline contradicted my knowledge. I stopped. There were just too many mistakes to research each and every time I came across one. There are practice questions in the book. Some are taken from prior CFP exams. Some are not. A small portion of the answers are incorrect (even according to Rattiner's own outline). I personally consider one incorrect practice question to be too many. I've used test prep and test review materials for the CPA Exam, the Bar Exam, the LSAT, the ACT, the SAT, and the GMAT. Rattinger's study guide is the worst I have ever purchased.

The book is simply a summary outline of the material for the CFP test, which can easily be obtained on the Board's website. Without sufficient detail, I can not imagine how it could be helpful. Anthony

I found this book to be an accurate and concise review of the 101 topics covered on the CFP certification exam. This book was written in a great "review notes" format, much like I would take notes on a complex subject. I would highly recommend this book as a great CFP certification exam review. It is filled with only what you need to know- no extraneous commentary.

Like other comments have said, this book should not be used to initially learn the material. But if you use it as a review in the months and weeks before the CFP exam, it will be extremely helpful. I studied exclusively from this for the 2 weeks leading up to the exam, and wished I had started using it earlier. If you know everything in this book and can do TVM calculations, you'll be fine. I came out of the test feeling confident, and my passing score was confirmation. After taking the test, I thought the book contained exactly the right amount of detail. It is not just an outline. If you've already fulfilled the education requirements, you should know most of the material in here; but

reading it over a few times in the weeks before the test will cement it in your mind. I would also recommend that you go through and highlight the topics you feel weak on, then in the days before the test, focus on those areas. This review does not contain every detail that could possibly be on the test, and that's good. It forces you to focus on the important topics and is short enough that you can easily get through the entire book, and get a review on all the material, in less than a week's study time. If it was 1000 pages long, you would never be able to remember everything. But by focusing your study, it's not impossible to know nearly everything in this book, which will be sufficient to pass the exam. If you're using an edition not written in the year your taking the test, simply be aware of the new amounts. Go through and write in the correct values; it will be good review.

I bought this book in order to prepare for the CFP exam. The material and organization in this book is a joke. Clearly out of date and some questions were nonsensical. I had to cram in the last week before the exam and this book made it worse. I would happily return it for a refund had I not started taking notes in the first few pages - before realizing what a waste of my time. You are better off with the Kaplan books or others out there. Don't blow your dollars here though.

What sets Jeff and this book apart is that he actually sat on the CFP board for several years and he knows first hand how they devise the test. This book was not meant to be your only study source, but meant to be used in conjunction with the required educational coursework and the review class. Students who go through the Rattiner program have a 20% higher pass rate than those who don't. Rattiner's book and course are WELL worth the investment.

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