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Recommendation regarding Jeff Rattiner and his Financial Planning Crash Course for the CFP exam.

I worked with several organizations over the course of three years in preparation for the CFP exam, The American College, The College for Financial Planning and Kaplan. All of which provided a basic and general assertions and statements on what to know for the CFP exam. After taking several practice exams provided by these institutions, I was failing to meet the standard passing scores from the comprehensive exams to achieve a passing score or what was stated as needed to pass the CFP exam.

I signed up for and took Jeff Rattiner's Financial Planning Crash Course in October of 2011 in preparation for the November 2011 exam. Jeff taught directly to the test topics and questions that were on the test material and dramatically improved my scores on the comprehensive exams I used to prepare for the November 2011 exam. He very thorough and resourceful at working through all the test material and spends extra time on topics you need to know and tells you what not to know. He does not waste time and manages the classroom very well and keeps the program on task. In addition, his background as a planner brought many real examples to the classroom that helped drive the topic home or its use in the CFP planning process.

He was very accurate with the types of questions you will see on the test, the formulas and short cuts to use in the exams, and triggers and statements to look for in the exam that might give clues and support in working through problems on the exam. I know the course helped refresh a lot of the information I had gone over in preparing to take the exam, however many of his techniques on how to take the exam provided the extra boost necessary to understand, decipher and address the way the CFP tries to weed out those not familiar with the material or topics.

The 3 days spent with Jeff where well worth the investment and time. *Passing the CFP exam the first time* is even better! There was a 60.7% pass rate for the November 2011 exam with a record 4,064 test takers; 1,011 of which were 2nd time test takers with only 49.2% of 2nd timers passing. To be 1 of the 102,159 that have taken the exam since 1991 and passed you can think about it. However, your time and commitment to success is worth it to use Jeff Rattiner!

I highly recommend Jeff as an instructor and trainer in helping you achieve your goal of passing the CFP exam and know you will be happy with your investment in his service.

Regards,

Quinn McElwee