

01	☐ A	☐ B	☐ C	☐ D	☒ E
02	☒ A	☐ B	☐ C	☐ D	☐ E
03	☐ A	☐ B	☐ C	☒ D	☐ E
04	☐ A	☐ B	☐ C	☒ D	☐ E
05	☒ A	☐ B	☐ C	☐ D	☐ E
06	☐ A	☐ B	☐ C	☐ D	☒ E
07	☐ A	☐ B	☒ C	☐ D	☐ E
08	☐ A	☒ B	☐ C	☐ D	☐ E
09	☒ A	☐ B	☐ C	☐ D	☐ E
10	☐ A	☐ B	☐ C	☐ D	☒ E
11	☐ A	☐ B	☐ C	☐ D	☒ E
12	☐ A	☒ B	☐ C	☐ D	☐ E
13	☐ A	☐ B	☐ C	☐ D	☒ E

14	☐ A	☐ B	☐ C	☐ D	☒ E
15	☐ A	☒ B	☐ C	☐ D	☐ E
16	☒ A	☐ B	☐ C	☐ D	☐ E
17	☐ A	☐ B	☒ C	☐ D	☐ E
18	☐ A	☐ B	☒ C	☐ D	☐ E
19	☒ A	☐ B	☐ C	☐ D	☐ E
20	☐ A	☒ B	☐ C	☐ D	☐ E
21	☒ A	☐ B	☐ C	☐ D	☐ E
22	☐ A	☒ B	☐ C	☐ D	☐ E
23	☒ A	☐ B	☐ C	☐ D	☐ E
24	☐ A	☐ B	☐ C	☒ D	☐ E
25	☐ A	☐ B	☐ C	☒ D	☐ E
26	☐ A	☐ B	☐ C	☒ D	☐ E

27	☐ A	☐ B	☒ C	☐ D	☐ E
28	☐ A	☒ B	☐ C	☐ D	☐ E
29	☐ A	☒ B	☐ C	☐ D	☐ E
30	☐ A	☐ B	☐ C	☒ D	☐ E
31	☐ A	☐ B	☒ C	☐ D	☐ E
32	☐ A	☐ B	☐ C	☒ D	☐ E
33	☐ A	☒ B	☐ C	☐ D	☐ E
34	☐ A	☒ B	☐ C	☐ D	☐ E
35	☐ A	☐ B	☒ C	☐ D	☐ E
36	☐ A	☐ B	☐ C	☒ D	☐ E
37	☐ A	☐ B	☐ C	☐ D	☒ E
38	☐ A	☐ B	☐ C	☐ D	☒ E
39	☐ A	☐ B	☐ C	☒ D	☐ E

PRACTICE QUESTIONS

Certified Financial Planner Exam (CFP®)

CFPTA

CFP Testing Accommodations Exam

EDITION

Demo

QUESTIONS

9

FORMAT

Limited Edition PDF

Before you begin

What this is

9 practice questions for Certified Financial Planner Exam (CFP®) **CFPTA**, each with its answer key and an explanation. Answer a question before you read its key — the explanation is worth more once you have committed.

If something looks wrong

Send us three things and we will check it:

- the exam code, **CFPTA**
- the question number
- the email address on your order

Write to **support@mometrix.net**. We reply within one business day.

QUESTION 1

SINGLE CHOICE

A candidate with a documented disability is preparing to request testing accommodations for the CFP Certification Examination. Under the published accommodations policy, what is the primary purpose of the accommodations request?

- ☐ A To provide the candidate with an unfair advantage over non-disabled candidates.
- ☒ B To ensure the exam measures the candidate's competence rather than the impact of a disability.
- ☐ C To lower the passing score required to obtain the CFP® mark.
- ☐ D To waive any candidate prerequisites that have not yet been completed.

ANSWER B

WHY The purpose of accommodations is to remove barriers caused by a disability so that the exam results reflect the candidate's knowledge and competence, not the functional limitations of the disability. Accommodations do not provide an advantage, do not alter passing scores, and do not waive eligibility prerequisites.

QUESTION 2

SINGLE CHOICE

Which of the following is most likely to be required as part of the documentation submitted with a CFP Testing Accommodations request?

- ☐ A A personal letter from the candidate describing their study habits.
- ☒ B A recent evaluation or diagnostic report from a qualified professional describing the disability and its functional impact.
- ☐ C A reference letter from a CFP® professional who knows the candidate.
- ☐ D A copy of the candidate's most recent tax return.

ANSWER B

WHY Accommodations requests must be supported by current, objective documentation from a qualified professional that identifies the disability and explains its functional limitations on test-taking. Personal letters, professional references, and tax documents do not establish a disability or its impact on examination performance.

QUESTION 3

SINGLE CHOICE

A candidate plans to sit for the CFP Certification Examination in the upcoming testing window. According to the published accommodations policy, when should the completed accommodations request and supporting documentation be submitted?

- ☐ A On the day of the exam, directly to the test center proctor.
- ☐ B At least 30 days after the scheduled exam date.
- ☒ C By the published deadline, well in advance of the desired exam date, to allow time for review.
- ☐ D Only after the candidate has failed the exam on a first attempt.

ANSWER C

WHY Accommodations requests and supporting documentation must be submitted by the published deadline, well in advance of the desired exam date, so that the Board of Standards can review them and arrange approved accommodations with the testing delivery partner before the exam date. Late, day-of, or post-exam requests are not processed.

QUESTION 4

SINGLE CHOICE

Which of the following is an example of a testing accommodation that may be approved for a candidate with a documented disability on the CFP Certification Examination?

- ☐ A Open-book access to reference materials during the exam.
- ☒ B Extended time on the examination.
- ☐ C A reduced number of questions on the exam.
- ☐ D Use of an unauthorized electronic device for note-taking.

ANSWER B

WHY Approved accommodations commonly include extended time, a separate testing room, screen magnification, or other modifications that address functional limitations without altering the construct being measured. Open-book access, reduced question counts, and unauthorized electronic devices are not permitted accommodations because they would change what the exam measures.

QUESTION 5

SINGLE CHOICE

To whom does a candidate submit a formal request for testing accommodations for the CFP Certification Examination?

- ☐ A The test center proctor on the day of the exam.
- ☐ B The IRS.
- ☒ C The CFP Board's Board of Standards (or its designee), per the published accommodations policy.
- ☐ D The candidate's undergraduate college or university.

ANSWER C

WHY Accommodations requests are submitted to the CFP Board's Board of Standards, which reviews documentation and determines whether accommodations will be granted. Requests are not handled by test center proctors on exam day, by the IRS, or by academic institutions.

QUESTION 6

SINGLE CHOICE

When completing the accommodations request form, what is the candidate's key responsibility regarding the information provided?

- ☐ A To list only accommodations they think will be easiest to obtain.
- ☐ B To request accommodations that are not supported by any documentation.
- ☒ C To provide complete, accurate information about the disability and the specific accommodations requested.
- ☐ D To defer completion of the form to a family member.

ANSWER C

WHY The candidate is responsible for providing complete, accurate information about the disability and the specific accommodations being requested. Withholding information, requesting accommodations unrelated to documented limitations, or having someone else complete the form undermines the review process and may delay or deny approval.

QUESTION 7

SINGLE CHOICE

How is the documentation submitted as part of a CFP Testing Accommodations request handled by the CFP Board?

- ☐ A It is posted publicly on the candidate's CFP® profile.
- ☐ B It is shared with all current CFP® certificants.
- ☒ C It is kept confidential and used only for evaluating and implementing the accommodations request.
- ☐ D It is discarded immediately after the exam is completed.

ANSWER C

WHY Documentation submitted with an accommodations request is kept confidential by the CFP Board and used solely to evaluate the request and arrange approved accommodations. It is not posted publicly, shared with other certificants, or discarded before the Board has completed its review and the exam has been administered.

QUESTION 8

SINGLE CHOICE

A candidate deliberately misrepresents the nature of a disability in an accommodations request to gain an advantage. Under the published accommodations policy and the CFP Board's Rules of Conduct, what is the most likely outcome?

- ☐ A No action, because accommodations requests are always approved.
- ☐ B A refund of all exam fees and a guaranteed retake.
- ☒ C Denial of the request and possible disciplinary action under the CFP Board's Rules of Conduct.
- ☐ D Automatic conversion of the application to a scholarship.

ANSWER C

WHY Misrepresentation in an accommodations request is treated as a violation of the CFP Board's Rules of Conduct. The likely consequences are denial of the accommodations request and potential disciplinary action, which may include sanctions against the candidate's eligibility for the CFP® marks.

QUESTION 9

MULTIPLE CHOICE

Which of the following items are typically required as part of a complete CFP Testing Accommodations request? (Choose two.)

- ☒ **A** A completed official accommodations request form provided by the CFP Board.
- ☐ **B** Current diagnostic or evaluation documentation from a qualified professional.
- ☐ **C** A list of every financial planning textbook the candidate has read.
- ☒ **D** A specific description of the accommodations being requested and the rationale for each.

ANSWER A • D

WHY A complete request includes the CFP Board's official accommodations request form and a clear description of the specific accommodations requested along with the rationale for each, supported by current professional diagnostic or evaluation documentation. Reading lists and other unrelated materials are not part of the standard accommodations submission.