

**CFP BOARD**

**CFP BOARD  
ITEM WRITER  
POSITION  
DESCRIPTION**

## **VOLUNTEER ITEM WRITER**

### **What is an Item?**

The term “item” is used when referring to an exam question.

### **Who is an Item Writer?**

An Item Writer is a trained, certified CFP® content expert who writes items for the CFP® certification exam.

### **Why should I be an Item Writer?**

Item Writers stay up to date on financial planning knowledge while also receiving free Continuing Education hours to maintain the certification.

### **How do I become an Item Writer?**

Complete the volunteer application and register for an item writing campaign. CFP Board will provide volunteer support and item writer training.

## **ITEM WRITING INITIATIVE**

CFP Board works with volunteer CFP® professionals to develop questions for the CFP® exam. Volunteers create multiple-choice questions that align with the Principal Knowledge Topics of the exam.

Volunteers do not need prior experience. Prometric test developers will train volunteers to write questions. Exam questions include rationales that support the correct answer and explain why other choices are incorrect.

The content development occurs during either in-person workshops or virtual writing campaigns. During virtual campaigns, each volunteer develops 15 questions over a two-week period. After the first training, volunteers meet twice virtually during the campaign to review and adjust draft content based on editor feedback.

If you are currently certified, interested in becoming an Item Writer, or have questions, contact Eric Nepomuceno, Examinations Program Manager at [enepomuceno@cfpboard.org](mailto:enepomuceno@cfpboard.org).

## **TIME COMMITMENT**

- Average of 15 hours

## BENEFITS

- Earn 15 CE credit hours.
- Network and collaborate with other CFP® professionals.
- Contribute to the evolution of the CFP® certification.
- Enhance your knowledge of financial planning.
- Build your resume with activities that contribute to the advancement of the profession.

## QUALIFICATIONS & EXPERTISE

You must be a CFP® professional with:

- an interest in examination standards
- a willingness to work collaboratively, give, and receive constructive feedback
- extensive financial planning expertise, preferably with specialty knowledge in one or more of the following areas: financial management, asset management, risk management, tax planning, retirement planning, and estate planning
- proficiency using web-based systems for completing assignments

## TRAINING & SUPPORT

- In-person or virtual training covering best practices for writing test questions and use of writing software
- Review editor feedback during check in meetings to improve items before final submission

## TERMS AND REQUIREMENTS

- CFP Board requires a commitment of one year; CFP Board encourages added years of service if both parties have mutual interest.
- Sign an annual Confidentiality Agreement which attests that attests to NO conflicts of interest, including:
  - 1) current involvement in activities to prepare candidates for the related credential, such as writing materials for, or teaching in, prep or review course(s) or authoring review texts;
  - 2) serving as item writer for other credentialing exams.

# **CFP BOARD**

**CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.**

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