

Instructions for use:

The following represents a comprehensive, but not exhaustive, list of resources that can be used as you prepare to take the CFT-I™ Exam. The resources are organized by the three primary educational areas of CFT-I™ certification: 1) Financial Planning; 2) Mental Health; and 3) Financial Therapy. Following each list of resources is a coverage map, aimed to help connect you to resources that address particular knowledge areas.

Candidates for the CFT-I™ should select a combination of resources for self study that they feel appropriate for them based on their background and familiarity with the respective competency areas. Additional resources outside of this guide may be used by the CFT-I™ Candidate in their self-study program.

Financial Competency Resources

A variety of college-level Personal Finance and Financial Planning textbooks provide material that is appropriate for someone studying for the CFT-I™ Exam. The following list includes a sample of some of the most widely used books:

- *Personal Finance: Turning Money into Wealth*, Keown, Prentice Hall
 - ISBN-13: 978-0-132719-16-2
- *Personal Finance*, Kapoor, Dablay & Hughes, McGraw-Hill
 - ISBN-13: 978-0-077861-64-3
- *Personal Finance*, Garman & Fogue, Cengage
 - ISBN-13: 978-1-133595-83-0
- *Personal Finance*, Madura, Pearson
 - ISBN-13: 978-0-134082-56-1
- *Personal Finance*, Bajtelsmit, Wiley
 - ISBN-13: 978-0-471723-56-1
- *Introduction to Personal Finance: Beginning Your Financial Journey*, Grable & Palmer, Wiley
 - ISBN-13: 978-1-119453-05-5
- *Fundamentals of Financial Planning*, 5th Edition, Dalton et. Al, Money Education
 - ISBN-13: 978-1-936602-41-4
- *The Tools & Techniques of Financial Planning*, 12th Edition, Jackson, Satinsky & Leimberg, National Underwriter
 - ISBN-13: 978-0-872189-89-8
- *The Fundamentals of Writing a Financial Plan*, 1st Edition, Grable, Kruger & Ford
 - ISBN-13: 978-1-949506-36-5
- *The Comprehensive Financial Planning Bundle: The Case Approach and the Process*, 2nd Edition, Lytton, Grable & Klock, National Underwriter
 - ISBN-13: 978-1-945424-27-4
- *Federal Trade Commission – website on Identify Theft*
 - ftc.gov/idtheft
- *Consumer Financial Protection Bureau – Consumer Tools on website*
 - consumerfinance.gov

	A	B	C	D	E	F	G	H
<i>Personal Finance: Turning Money into Wealth</i>	X			X	X	X	X	
<i>Personal Finance, Kapoor</i>	X			X	X	X	X	
<i>Personal Finance, Garman & Forgue</i>	X			X	X	X	X	
<i>Personal Finance, Madura</i>	X			X	X	X	X	
<i>Personal Finance, Bajtelsmit</i>	X			X	X	X	X	
<i>Introduction to Personal Finance: Beginning Your Financial Journey</i>	X			X	X	X	X	X
<i>Fundamentals of Financial Planning</i>	X	X	X	X	X	X	X	X
<i>The Tools & Techniques of Financial Planning</i>	X	X	X	X	X	X	X	X
<i>The Fundamentals of Writing a Financial Plan</i>	X	X	X	X	X	X	X	X
<i>The Comprehensive Financial Planning Bundle: The Case Approach and the Process</i>	X	X	X	X	X	X	X	X
<i>Federal Trade Commission – website on Identify Theft</i>				x		x		
<i>Consumer Financial Protection Bureau</i>						x		

Financial Competency Areas & Weightings (30% of Comprehensive Exam)

- A. Fundamentals of Economics (5%)
- B. Basics of Behavioral Economics (10%)
- C. Fundamentals of Financial Planning & Counseling (15%)
- D. Money Management I (15%)
- E. Money Management II (10%)
- F. Identity Theft and Consumer Protection (5%)
- G. Basic Financial Analysis I (20%)
- H. Basic Financial Analysis II (20%)

Therapeutic Competency Resources

A variety of college-level Psychology, Communication, Therapy, and Financial Therapy textbooks provide material that is appropriate for someone studying for the CFT-I™ Exam. The following list includes a sample of some of the most widely used books. Candidates for the CFT-I™ will also find articles in the Journal of Financial Therapy useful as they prepare for the CFT-I™ Exam.

- *Financial Counseling: A Strategic Approach*, 3rd Edition, Pulvino, Instructional Enterprises
 - ISBN-13: 978-0-615352-09-1
- *Financial Therapy, Theory, Research, and Practice*, Klontz, et al., Springer
 - ISBN-13: 978-3-319-34411-9
- *Facilitating Financial Health*, 2nd Edition, Klontz & Kahler, National Underwriter
 - ISBN-13: 978-1-941627-87-7
- *Communication Essentials*, Grable & Goetz, Wiley
 - ISBN-13: 978-1-119350-78-1
- *Client Psychology*, Chaffin, Wiley
 - ISBN-13: 978-1-119436-26-5
- *Mastering Competencies in Family Therapy*, Gehart, Cengage
 - ISBN-13: 978-1-305943-27-8
- *Family Therapy: Concepts and Methods*, 11th Edition, Nichols & Davis, Pearson
 - ISBN-13: 978-0-133826-60-9

	I	J	K	L	M	N	O
<i>Financial Counseling: A Strategic Approach</i>				X			
<i>Financial Therapy: Theory, Research, and Practice</i>						X	
<i>Facilitating Financial Health</i>		X	X			X	
<i>Communication Essentials</i>				X	X		
<i>Client Psychology</i>					X		X
<i>Mastering Competencies in Family Therapy</i>	X	X	X	X	X		X
<i>Family Therapy: Concepts and Methods</i>	X	X	X				

Therapeutic Competency Areas & Weightings (30% of Comprehensive Exam)

- I. The Fundamentals of Therapy (10%)
- J. Theories and Models of Therapeutic Intervention I (20%)
- K. Theories and Models of Therapeutic Intervention II (15%)
- L. Communication & General Counseling Skills I (20%)
- M. Communication & General Counseling Skills II (15%)
- N. Knowledge of Mental Health Diagnoses (10%)
- O. Culture and Diversity (10%)

Financial Therapy Competency Resources

Additional resources for the Financial Therapy competency areas will be delivered primarily via the online video series. The following list represents identified resources that will be referenced in the videos and will be useful for candidates preparing for the CFT-I™ exam.

- *Financial Therapy: Theory, Research, and Practice*, Klontz et al., Springer
 - ISBN-13: 978-3-319-34411-9
- *Facilitating Financial Health*, 2nd Edition, Klontz & Kahler, National Underwriter
 - ISBN-13: 978-1-941627-87-7

	P	Q	R	S
<i>Financial Therapy: Theory, Research, and Practice</i>		X	X	X
<i>Facilitating Financial Health (Chapter 15)</i>	X			
<i>Facilitating Financial Health (Chapter 5)</i>				X

Financial Therapy Competency Areas & Weightings (40% of Comprehensive Exam)

- P. Self of the Financial Therapist (20%)
- Q. Research Evaluation (10%)
- R. Money and Relationships (40%)
- S. Standards of Practice and Ethical Considerations (30%)