



Certified Financial Fiduciary Candidate Instructions

Scheduling Your Exam Appointment

You will receive an email from Prometric/IQT notifying you of your eligibility to sit for the CF2 exam. This email will contain specific instructions, as well as a user ID, and password to access the Prometric/IQT Testing portal.

Candidates are responsible for scheduling their examination within the approved testing window and ensuring all technical and environmental requirements are met prior to exam day.

Rescheduling/Cancellation Policy

You may reschedule prior to (5) calendar days before your scheduled exam date by contacting Prometric and paying a \$35.00 rescheduling fee.

If it is less than (5) calendar days prior to your exam date, you will not be allowed to cancel or reschedule your exam unless one of the following 4 situations have occurred:

- ☐ Jury Duty
- ☐ Death of an immediate family member (defined as grandparents, parents, spouses, siblings, children).
- ☐ Medical emergency
- ☐ Active-duty military orders

If you experience any of the above, you **MUST** provide Prometric with proper documentation at SMT-OperationsTeam@prometric.com before being rescheduled to a new date. You may also reach Prometric at 1-866-773-1114.

If you fail to show up for your examination at the scheduled time, do not have the proper identification, or do not have your admission document, you will not be allowed to sit for your exam. You will be considered a no-show and will need to pay an additional fee of \$50 to reschedule your exam.

Due to the costs incurred by NACFF related to no-shows, candidates who are a no-show for their retake (second) appointment will not be eligible to schedule a third exam appointment.

Candidates unable to complete the exam due to verified technology issues must contact NACFF for rescheduling assistance. No additional fees will apply.

Candidates who do not pass the examination on their first attempt are eligible for one (1) retake at no additional cost.

Rescheduling Your Exam Appointment due to Technology Issue or Not Passing

Candidates who did not pass their exam on the first attempt or were unable to test due to a technology issue must contact NACFF for assistance. Once you are approved by NACFF to schedule a new appointment, you will receive a new email from Prometric/IQT notifying you of your eligibility to schedule a new appointment for the CF2 exam.

Preparing for Your Exam Appointment – Remotely Proctored Testing

Please take time to review following information carefully to ensure a successful remote proctor exam launch on your test day. Note that the exam is administered with a live proctor – not an AI proctor.

After you have scheduled your exam appointment, you will receive an email that contains your Candidate Admission Letter. **You must print and have the letter with you on your exam day.**

At least 1 week prior to your exam:

1. [Click here](#) to view the ProProctor User Guide.
2. [Click here](#) to install the ProProctor Application and perform a System Check.

At least 24-48 hours prior to your exam:

Prepare your exam space at least 24-48 hours prior to your scheduled exam.

Carefully read the Remote Proctor Regulations, listed below, and adjust your test environment accordingly. Your office or home setting must meet the following requirements:

- ☐ Testing location must be indoors (walled), well lit, with a closed door and free from background noise and disruptions.
- ☐ A third party may not be present in the room, or enter the room, for the duration of the exam. If this occurs, your exam will be terminated and/or your results invalidated.
- ☐ Your workstation and surrounding area must be free of pens, paper, electronic devices, or content that could potentially provide an unfair advantage during your exam, including that posted on walls or within your immediate area.
- ☐ Must have working speakers and microphone. Adjust your volume prior to launching your exam.
- ☐ Do not use your corporate or company laptop. Corporate or company laptops often have additional software that prevents third party programs from functioning as they should.

- ❑ Operating system must either be Windows 8.1 or higher (Windows 7 is NOT supported) or Mac 10.13 or higher.
- ❑ Acceptable Hardware: desk computer or laptop with webcam access (no iPhones, iPads, Androids, Chrome Books)
- ❑ You must have a working camera connected to your device. An external camera required if using a desktop. The camera is used as part of the check-in process and during the exam. If you are using a desktop computer or a laptop with the screen closed, the camera must be connected via USB.

On exam day:

- ❑ Be prepared to show your printed Candidate Admission Letter and a valid Government Issued ID: driver's license/passport (Digital or electronic identification will not be accepted.). This must be valid, unexpired government-issued ID that is both signature and photo bearing. The name on your admission letter must match the name on your photo ID.
- ❑ Be prepared for a thorough check in process, which follows standard security procedures. Prometric will inspect:
 - Workstation and surrounding area.
 - Eyeglasses (temporary removal for close visual inspection), and other accessories, to ensure they do not contain a recording/camera device used to capture exam content.
 - Hair accessories, ties and bowties. Please refrain from using ornate clips, combs, barrettes, headbands, tie clips, cuff links and other accessories as you may be prohibited from wearing them during the exam and asked to remove these items. If you have long hair that covers your ears, you will be asked to pull your hair back to ensure nothing is attached to your ear that could provide an unfair advantage (such as a Bluetooth earpiece).
 - Long pants (raise your pants legs above your ankles), pockets (empty and turn all pockets inside-out) and shirt sleeves (raise shirt sleeves above your wrists).
- ❑ Be aware of the list of prohibited items:
 - Unauthorized personal items may not be accessible while testing. Such items include, but are not limited to: outerwear (coats, parkas, etc.), hats, jewelry (outside of wedding/engagement rings), food, drinks, purses, bags or briefcases, notebooks, books, written notes, published material/other testing aids, watches, cell phones, electronic devices, or wearable technology.
 - No eating, drinking (besides water), smoking, or chewing gum during the exam.
 - Light clothing items for comfort such as sweaters, suit jackets, scarves, etc., must be hung on the chair, not placed in your lap or on the desktop.
 - You may not change locations, turn off lighting or audio, speak to, or receive aid from other individuals while testing.
 - No leaving the camera view while the exam is in progress

Issues Prior to or During an exam

If you have issues launching your exam, or you encounter an issue during the exam, you may engage with a representative from Prometric's Global Help Desk, through the chat feature. NACFF cannot assist with tech issues you may encounter through the ProProctor App. If the issue persists AND the Global Help Desk is unable to resolve the issue, candidates must obtain a ticket number from the Global Help Desk and reach out to Prometric at SMT-OperationsTeam@prometric.com to send a detailed email regarding the issue you encountered.

NACFF reserves the right to review and invalidate examination results when examination irregularities, security concerns, or policy violations are identified.

Preparing for Your Exam Appointment – In Person Testing

After you have scheduled your exam appointment, you will receive an email that contains your Candidate Admission Letter. **You must print and have the letter with you on your exam day.** If you do not, you will be denied entry to your scheduled exam and any fees paid will be forfeited.

On exam day:

- ❑ Arrive early. Arrive at the testing center A MINIMUM OF 30 MINUTES BEFORE YOUR APPOINTMENT TIME. If you have any doubts about the location of the testing center, Prometric strongly recommends that you utilize GPS and/or print out a map to the location. You may wish to drive to the center in advance (the evening prior, for example), to ensure you know where it is located. Due to limited parking facilities at some testing centers, please allow ample time to park and reach the testing area.
- ❑ Bring the proper identification. Be prepared to show your printed Candidate Admission Letter and a valid Government Issued ID: driver's license/passport (Digital or electronic identification will not be accepted.). This must be valid, unexpired government-issued ID that is both signature and photo bearing. The name on your admission letter must match the name on your photo ID.
- ❑ Do not bring prohibited items. All electronics, i.e. cell phones, beepers, watches, headphones are prohibited in the testing area. Earplugs for sound suppression are allowed. No eating, drinking (besides water), smoking, or chewing gum during the exam. While test centers are climate controlled to the extent possible, be prepared for either warm or cool temperatures at the testing center.

If your area is experiencing inclement weather, it is your responsibility to contact your testing center to confirm if it is closed or delayed in opening. Most likely there will be a voice message on the testing center's phone system to notify candidates of any change in business hours during the inclement weather. If you are unable to take your examination due to the inclement weather, you must contact Prometric directly at SMT-OperationsTeam@prometric.com, 1-866-773-1114 or (727) 733-1110 to reschedule your examination for a later date. There are no additional costs for such reschedules.

Accommodations

NACFF is committed to providing reasonable accommodations*for qualified candidates with documented disabilities, in compliance with the Americans with Disabilities Act (ADA).

Candidates requiring accommodations must submit a formal request at least 30 days prior to the desired exam date by contacting: info@nationalCFFassociation.org

Accommodation determinations are made by NACFF and coordinated with the testing vendor, where applicable.

Requests must include documentation from a qualified professional describing the disability, functional limitations related to testing, and recommended accommodations.

Examples of accommodations may include extended testing time, additional breaks, assistive technology, or modifications to proctoring procedures. Accommodations are provided without compromising exam security, validity, or scoring standards.

All accommodation decisions are made individually, communicated in writing, and maintained confidentially as part of NACFF's certification records.

Confidentiality of Exam Content/Systems

The remote proctor application, computer-based test delivery system, tutorial, exam content, and survey are the published, confidential, and proprietary materials or intellectual property of Prometric and/or your test sponsor. Communicating, publishing, reproducing, or transmitting any part of an exam, in any form or by any means (e.g. verbal, electronic, written, etc.) for any purpose is strictly prohibited. ANY reproduction or disclosure will result in immediate notification to your test sponsor and potential filing of administrative, civil and/or criminal charges against you and anyone directing or conspiring with you.

Examinee Conduct

Candidates are required to be professional, civil and respectful while testing. All exams are continuously monitored by video and audio recording. The Proctor is authorized to dismiss you from the test session for a violation of any of the Testing Regulations, including exhibiting abusive behavior towards the Proctor or other test candidates. If you are found to have violated any of the regulations during your exam, the Proctor is required to notify Prometric and NACFF.

Prometric, alone or in conjunction with your test sponsor, shall then take any further action necessary to sanction your conduct, up to and including invalidation of your test score and/or pursuit of civil or criminal charges. By proceeding with remote examination delivery, candidates acknowledge and consent to audio and video monitoring and recording for examination security

and integrity purposes. If you do not wish to be recorded (either by video or audio), please notify the proctor immediately of your intent not to proceed with the exam.