



CSLA Board of Standards

REQUIREMENTS
CREDIBILITY
STANDARDS
OVERSIGHT

Certified Student Loan Professional designation is intended for financial professionals providing student loan repayment services. All candidates are subject to a review and verification of their existing credentials. Two years work history in a financial services role, or a bachelor's degree in finance or related field of study is required.

The CSLP® course of study is a comprehensive program addressing the rules and strategies associated with student loan repayment.

Courses in this program teach how to help clients in creating a personalized approach to repayment that matches their financial capabilities and future goals. Example case studies of different client situations are provided. Other modules explain the laws and qualifications for each repayment plan. Risks and rewards are discussed along with the associated costs and duration to complete repayment.



Certified Student Loan Professional Designation (CSLP®) Review

Requirements
Credibility
Standards
Oversight



CSLA Board of Standards

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Enhancing Repayment Advice

INSURING ADVISORS PROVIDE PRUDENT REPAYMENT ASSISTANCE

The CSLP® (Certified Student Loan Professional) designation is administered and issued by the Certified Student Loan Advisor Board of Standards (CSLA BOS). The CSLA BOS is a 501c3 non-profit organization whose mission is to reduce the impact of student debt on the long term finances of student borrowers. In addition to providing student loan borrowers with consumer education and tools about their loan repayment options, the CSLA BOS assists borrowers by enhancing the advice received from financial professionals. The CSLA BOS benefits borrowers by educating and identifying the financial services professionals who help borrowers understand how repayment options factor in their financial plan.

Formally known as CSLA, the CSLP® is distributed under the accreditation of the WSAC and the California State University system in partnership with Humboldt State University. Financial professionals who obtain the CSLP® designation demonstrate a depth of knowledge about financial aid and student loan repayment options within the context of personal financial and tax planning.

Financial professionals who hold the CSLP® designation will be uniquely positioned for the 43 million student debtors as having completed the required training to assist with making complex repayment decisions and the impact of those decisions on their personal and financial goals.



CSLP® DIRECOTRY

In order to help consumers find financial professionals who are knowledgeable and able to assist with determining their loan repayment strategies, the CSLP® provides an advisor directory. Consumers can search by name, professional designation, or state.



WEB SOLUTIONS

The CSLP® primary knowledge topics are covered in more than 35 web based self study lessons with corresponding reading material and quizzes. All course work must be completed within a 6 month time frame. Course content is available to be reviewed as many times as desired by the candidate up until they begin the comprehensive final



Proctored Exam

At the completion of the curriculum, candidates will be required to take a proctored final exam. The comprehensive exam consists of 90 multiple choice questions that must be completed within the 2 hour examination limit. In order to achieve the CSLP® designation all candidates must attain a minimum passing score of 70%.

CSLP® DESIGNATION

- INTEGRITY
- COMPETENCE
- PROFESSIONAL JUDGEMENT
- RESPECT
- PRUDENCE
- KNOWLEDGE OF THE LAW
- DILLIGENCE
- INDEPENDENCE
- OBJECTIVITY
- CARE

Providing solutions for student loan borrowers

CSLP® PROVIDES A SOLUTION FOR BORROWERS AND ADVISORS

ETHICAL & PROFESSIONAL CONDUCT

The CSLA BOS's Code of Ethics and Standards of Professional Conduct are fundamental to the values of the CSLP® designation and essential to achieving it's mission. All designees are required to complete and adhere to the ethics agreement. Failure to comply with the code of ethics and standards of professional conduct will result in disciplinary action including revocation of the CSLP® designation.

RECOGNITION BY OTHER BODIES

The importance of the educational content in the CSLP® course modules has been recognized by other professional organizations since 2015. Courses that contain information in the CSLP® curriculum are available for credits from the following issuing bodies:

- CPA CPE (check state units)
- CFP Board (23 credit hrs)
- CSU 2 credit hours
- Accredited by WSAC



HISTORY OF CSLP®

The CSLP® designation is the culmination of more than 25 years of assisting financial planners and borrowers with incorporating student loan repayment into the financial plans. The roots of the designation date back to 2005 and the basis for the content was has been found in training seminars for registered advisor representatives across the US since 2010. In 2016, the Certified Student Loan Advisor Board of Standards was created with the mission of elevating the level of advice provided to those struggling with student debt. Creating the CSLA BOS allowed for an issuing body to insure those with student loans were being serviced in an ethical and professional manner, while also creating an identifiable credential that could be recognized by those seeking financial assistance with student loan repayment. FINRA recognized the CSLP® designation in 2016.

CONSUMER COMPLAINT PROCESS

The CSLA BOS have established policies and procedures related to enforcing the standards of professional conduct which include the process for investigating allegations about CSLP® designees. Consumers that believe a CSLP® to be in violation can report misconduct by filing an online complaint. The CSLA BOS views complaints very seriously and investigates all complaints thoroughly and vigorously.

CONTINUING EDUCATION

The CSLA BOS believes financial professionals holding the CSLP® designation need to be current on the most recent regulatory changes in financial aid. The CSLA BOS requires its designees to take continuing education courses within one year of their release. New lessons are released when there are changes in policy, programs, or administration of student loans and their effects on financial planning. In order to renew their membership and maintain their status as a CSLP®, designees must pass an annual competency exam as well as an annual certification fee of \$200.

