Review Course for the CFP® Certification Examination
For November 2014 Exam

This is a Review Course for the CFP® Certification Examination offered in the Fall 2014 quarter (Reg# TBD). This review course is intended for those who have completed the PFP accelerated program or equivalent and are planning to sit for the November 2014 CFP® Certification Examination. The review course covers the Eight Job Task Domains and 78 Principal Topics you must master to be successful on the CFP® Board Certification Examination. The course includes test taking techniques & content workbooks with multiple choice review questions. One full day is devoted to case study analysis & strategies for approaching the CFP Board Exam. The session builds your confidence and increases your knowledge so that you can perform your best on the exam. The live review session provides an intensive classroom experience.

This course consists of 6 meetings on Thursday-Saturday, October 16, 17, 18, 23, 24, 25, 2014 (Thursdays and Fridays 8:00am-5:00pm, Saturdays 8:00am-6:00pm). The course fee is $1,250; $1,100 if you have taken UCI Extension’s Personal Financial Planning Certificate program or Specialized Studies accelerated program (Must register in person or by phone at 949/824-5414, press 1, to receive discount). Location: UCI Campus in Irvine.

We allow one retake of the next Review Course offering for $75. Please note full-paying students receive enrollment priority. Retake students will be placed on a waitlist and contacted to enroll approximately one week prior to the start date if space is available.

WHAT WILL BE REQUIRED OF YOU
If you have completed a registered financial planning curriculum offered by a CFP Board-registered institution other than the College For Financial Planning or UCI, or if you are a CPA, ChFC, or other professional challenging the CFP Board exam, in addition to enrollment in the Review Course you may want to purchase Review Course study materials prior to attending the live review. The Optional Review Course materials are at an additional cost and may be purchased from Keir Educational Resources at 800/795-5347.

BE PREPARED
You should complete the self-study Review Course materials prior to arriving for the review. You will receive separate session outlines at the program; therefore you do not need to bring Review Course study materials. Special Note: UCI-Extension reserves the right to cancel the class at any time prior due to insufficient registration or for any other reason.

NOTICE - This class is for educational purposes only; not to be construed as advice for investments, insurance, taxes, financial, retirement planning, accounting, estate planning or financial planning. Pricing subject to change.

If you have any questions about this course, you may contact the instructors Linda Hewitt at lindahewitt@msn.com, 714/777-0294 or Nancy LeClaire at nancy_leclaire@yahoo.com, 310/373-3223.