

Personal Financial Planning Certificate Program: Online and On Campus

UCI Continuing Education's Program in Personal Financial Planning is registered with the CFP Board. This registration allows graduates who wish to be recognized by the designation CFP® to take the CFP® Certification Examination.

WHO SHOULD ENROLL:

This program prepares individuals for employment in the financial planning field. It is designed for:

- Individuals who are considering a career in personal financial planning
- Current professionals in banking, accountants, stock-brokers and attorneys
- Mid-career professionals in the finance industry who want to hone their skills

PROGRAM BENEFITS:

- Obtain knowledge and skills that will enable you to offer sound financial advice and quality client service.
- Curriculum satisfies the CFP Board's education requirement to sit for the CFP® Certification Examination.
- Strengthen your professional network.
- California Department of Insurance CE credit available on select courses.
- Program available online and on campus.

TRANSFER CREDIT FOR GRADUATE DEGREE:

Students who complete the Personal Financial Planning Certificate Program are eligible to transfer credits into a graduate degree in financial planning at California Lutheran University.

207,768
JOBS (2018)

13.8%
PROJECTED GROWTH
(2018-2028)

\$58k-\$163k
ANNUAL SALARY
(25TH-75TH PERCENTILE)

CERTIFICATE PROGRAM: ONLINE / ON CAMPUS



8 COURSES



15-26 MONTHS



\$5,700

FOR MORE INFORMATION:

(949) 824-4661
FinancePrograms@ce.uci.edu

ce.uci.edu/pfp



REQUIRED COURSES

Principles of Financial Analysis

MGMT X433.20 (3.0 units)

Learn the basic analytical and mathematical tools used in personal financial planning. The concepts of cash flow, time value of money, present value, future value, annuities, amortization, net present value, and internal rate of return will be explored. The HP-12C or HP-10BII calculator is required.

Survey of Personal Financial Planning

MGMT X433 (4.0 units)

Learn the fundamental principles of comprehensive personal financial planning. The concepts of cash flow, college funding, insurance, taxation, investment analysis, employment benefits, retirement, estate planning, industry regulations, professional standards, the business cycle and monetary and fiscal policies will be explored.

Insurance Planning

MGMT X433.7 (4.0 units)

Learn how to manage risk with insurance. Life insurance, annuities, disability insurance, medical long term care, homeowner's insurance, auto insurance, umbrella liability policies, and public insurance programs such as Social Security, Medicare, and Medicaid will be explored.

Investment Planning

MGMT X433.1 (4.0 units)

Learn the investment concepts essential to personal financial planning. Securities laws and regulations, risk analysis, stock valuation, expected rates of return, market indicators, monetary policy, bonds, yield curves, futures, mortgages, mutual funds, and portfolio construction and management will be explored.

Income Tax Planning

MGMT X433.2 (4.0 units)

Learn how to recognize and take advantage of income tax planning opportunities. The concepts of income, deductions, rates, credits, sales, exchanges, tax favored investments, passive activity rules, and basic limitations will be explored.

Retirement Planning

MGMT X433.8 (4.0 units)

Learn the key components of a comprehensive retirement needs analysis. Stock options, non-qualified deferred compensation plans, non-pension-related benefits, tax favored corporate retirement plans, and non-corporate retirement plans will be explored.

Estate Planning

MGMT X433.9 (4.0 units)

Learn how wealth is protected and transferred through estate planning. Tax objectives, wills and living trusts, marital deductions, lifetime gifts and trusts, holding title to property, life insurance

and annuities, business interest, and post-death tax and legal problems will be explored.

Personal Financial Planning Practicum

MGMT X433.21 (4.5 units)

Learn how to apply the knowledge acquired from the required Personal Financial Planning curriculum to create a complete financial plan from the ground up. Client counseling, data gathering, presentation, and implementation of financial plans will be explored.

OPTIONAL NON-CERTIFICATE COURSES

Personal Financial Planning Internship

MGMT X433.45 (4.5 units)

Learn practical financial planning skills as an intern in a well-rounded financial planning firm. Interns will have the opportunity to learn about job functions such as client communications, strategic research, writing financial plans, investment management, marketing and more.

The Dalton Review® for the CFP® Exam

The Dalton Review is the exclusive review for our CFP® certification education programs. All UCI Continuing Education PFP students are eligible to receive a discount when enrolling in The Dalton Review. For more information visit ce.uci.edu/pfp.

ACCELERATED OPTION

The Personal Financial Planning Certificate Program – Accelerated Option allows students to complete this intensive in-depth program on select weekends over a 9-month period. Participants must have a minimum 3 years of experience in investments, banking, insurance, or financial planning, or 3 years of experience as a CPA, Attorney at Law, CLU, or ChFC.

PROGRAM SCHEDULE: January - October

Select Saturdays and Sundays, 8:00am - 5:00pm and approximately three (3) hours of classwork online following each weekend session

ACCELERATED PROGRAM FEE: \$4,550

COURSE TOPICS:

- Financial Planning Process
- Insurance Planning
- Investment Planning
- Tax Planning
- Retirement Planning
- Estate Planning
- Practicum (Capstone)

LOCATION: UCI Division of Continuing Education

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