2015
Personal Financial Planning Specialized Studies Program
[Accelerated]

- CFP Board Registered Program
- Convenient Accelerated Format
- Intensive study using a practical learning approach

extension.uci.edu/pfpaccelerated
This seven-part accelerated program covers the body of knowledge for CERTIFIED FINANCIAL PLANNERS™.

Successful completion of the program fulfills the educational requirements to sit for the CFP® Certification Examination. The program utilizes a client-centered, problem-solving methodology incorporating case studies, giving you a hands-on approach to learning how to be a personal financial planner.
Who Should Attend
This program is designed for experienced professionals seeking to take the CFP® Exam.

Program Requirements
• Participants must have 3 years experience in the investment, banking, insurance, or financial planning business, or 3 years experience as a CPA, Attorney At Law, CLU, or ChFC.
• Participants are required to participate in online sessions, attend every class session, complete all assignments, and pass the final exam with a grade of "C" or better.
• A series 7 license is highly recommended.

Program Benefits
• This CFP Board Registered Program fulfills the education requirements to sit for the CFP® Certification Examination
• Convenient accelerated schedule
• Learn a client-centered problem solving methodology using case studies and a hands-on approach

Curriculum
The Personal Financial Planning Accelerated Specialized Studies Program consists of seven modules:
• Financial Planning Process
• Insurance Planning
• Investment Planning
• Tax Planning
• Retirement Planning
• Estate Planning
• Practicum (Capstone)

Accelerated Program Dates, Location, Fees
January 31 - September 27, 2015
• Financial Planning Process
  January 31 and February 1, 7, 8, 2015
• Insurance Planning
  March 7, 8, 14, 15, 2015
• Investment Planning
  April 18, 19, 25, 26, 2015
• Tax Planning
  May 30, 31 and June 6, 7, 2015
• Retirement Planning
  July 11, 12, 18, 19, 2015
• Estate Planning
  August 8, 9, 15, 16, 2015
• Practicum (Capstone)
  September 12, 13, 26, 27, 2015

Dates/Time:  Saturday - Sunday, 8:00am - 5:00pm
Online: Three (3) hours of classwork following each weekend session

Location:  UC Irvine Campus
(Saturday - Sunday)

Fee:  $3,850 (does not include 7 required text-books – approx. $100 each plus tax and S&H)

Enrollment deadline:  January 16, 2015

Sole CFP® professionals generate between 40 and 100 percent more revenue than those financial professionals who do not hold the certification; team practices with a CFP® professional on staff generate 30 percent more in revenue.

Build your confidence.

Increase your knowledge.

Meet educational requirements for the CFP® Exam.

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For More Information
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