Personal Financial Planning Accelerated Program – Spring 2011 (Reg# 00232)

This in-depth program provides a client-centered, problem-solving methodology that includes case studies, giving you a hands-on approach to the material.

Held in Irvine on UC Irvine campus on Thursdays – Sundays (four 8:00am-6:00pm meetings on each subject) from April 7, 2011 – August 28, 2011. The Accelerated Program fee is $4,200 **. A short online orientation can be viewed on our website. The orientation will discuss the program details. Please go to http://unex.uci.edu/services/events/recorded.asp to view the recording (note the orientation recording has an outdated location). Below are the subjects and dates:

CFP 1 - The Financial Planning Process and Insurance: April 7 – 10, 2011
CFP 2 - Investment Principles: May 12 – 15, 2011
CFP 3 - Income Tax Planning: June 2 – 5, 2011
CFP 4 - Employee Benefits and Retirement Planning: July 21 – 24, 2011

To be eligible for the CFP Examination, students are also required to take the PFP Accelerated Program 6-day Practicum Course.

Practicum Course dates, Fri-Sun October 21, 22, 23, 28, 29, 30, 2011 from 8am-5:30pm on UCI Campus for the November 2011 CFP® Examination. Course Fee: $1,100.

Note: A series 7 license is highly recommended.

** Program fee does not include required materials (Study Guides) and parking.

Study Guides are $150 plus shipping & handling for each module. Instructions will be noted on your enrollment confirmation.

Daytime parking on campus is $74 per quarter. The daily rate for daytime parking is $8 per day. The quarterly permits are good for the following dates: Spring 4/1/11-6/30/11, Summer 7/1/11-9/30/11.

Based on this information, it would be more cost effective if you purchased a spring quarterly parking permit for the first 3 modules, then purchase daily parking for the last 2 modules and the Practicum Course.

There are substantial pre-work assignments. Enrollment deadline is March 24, 2011. Enrollments after this date must be approved by UCI Extension Business and Management or the instructors.

We do offer a payment plan for the Accelerated Program:

$1,500 at time of enrollment
$1,350 due May 31, 2011
$1,350 due June 30, 2011

To enroll using the payment plan option, you must either register by phone (949/824-5414, press 1), in person or by fax using the enclosed enrollment form. By phone or in person, ask for Marlita Harris or Jeni Park. If they are not available, one of the other representatives can assist you. Please note if payments are not submitted prior to the due dates listed above, you will not be allowed to continue.

Practicum Course: Payment due at time of enrollment.

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

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<th>COURSE DEPARTMENT NAME AND #/ TITLE</th>
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**STUDENT INFORMATION:**

Last Name | First Name | MI |
---|---|---|

Mailing Address:

City | State | Zip |
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Social Security Number | - | - | Date of Birth | / | / | Gender [ ] Male [ ] Female |

Day Phone ( ) | Alternate Phone ( ) |

Email Address:

Employer Name:

Employer Address:

City | State | Zip |
---|---|---|

**PAYMENT PLAN (Please check one and sign below):**

[ ] Yes, I would like to enroll for the PFP Accelerated Program and Review course under the payment plan outlined below. By signing below, I understand and agree that my credit card account listed will be charged for each subsequent payment on the dates specified. I understand that I must contact the UCI Extension Student Services Office prior to the payment deadline date if I wish to use a different form of payment. I understand that it is my responsibility to remit payments by the stated deadlines. Failure to do so may result in the withholding of my grades and/or transcripts, not being allowed to attend class, and the reporting of my account to a collection agency for further action.

[ ] No, I will pay the full course fee at the time of registration. By signing below, I understand that I will be charged the full program fee due at the time of registration.

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**PAYMENT INFORMATION:**

[ ] American Express [ ] MasterCard [ ] Visa [ ] Check (Payable to UC Regents)

Credit Card # | Expiration Date | / |
Cardholder Name: ____________________________________________________________________ |
Billing Address: _____________________________________________________________________ |
Authorizing Signature: ___________________________ Date: __________ |

FOR UC IRVINE EXTENSION STUDENT SERVICES OFFICE USE ONLY:

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11/18/2010