Financial Planning Case Study and Advanced Calculator Usage: Tools to Help You Pass the CFP® Certificate Examination
Management X433.23 (3 units)

An elective course in the Certificate Program in Personal Financial Planning.

This single, in-depth course is specifically designed to provide the "Extra Step" to gain financial planning knowledge to assist you in passing the CFP® Board Standards Certification Exam. Experience a sense of accomplishment to help energize and revitalize your career by leveraging the knowledge gained through this course to serve your clients in a comprehensive fashion. This newly designed course will simulate situations students will face in the practice of financial planning. Students will acquire tools and techniques necessary to gain competence, focus, and the confidence necessary to pass the rigorous two-day Board Standards Exam. The curriculum will include case study questions, advanced calculator usage and problems, investment formula calculations, and test taking methodology. Students will solve financial problems both independently and in a group study environment to help them sharpen their test taking skills. This course is recommended in conjunction with the 6 Day Live Review Course offered through UC Irvine Extension, as a supplement to assist students during their review time. It is highly recommended that students pre-purchase their review course study materials prior to attendance. Early registration recommended. Last refund date is April 28, 2010.

Instructors: Linda Hewitt, CFP®, CRPC®
Nancy LeClaire, CFP®, CPA, ChFC, CRPC®

When: Saturdays/Sundays, May 1, 2, 15, 16, 2010
     8:30am – 5:30pm, 4 meetings
Where: UCI Learning Center, 200 S Manchester, Orange 92868
Fee: $540
Reg #: 00362 (Spring 2010)

Call Student Services at (949) 824-5414 or visit http://unex.uci.edu/courses to enroll!
If paying with check, submit with attached enrollment form.
UCI EXTENSION ENROLLMENT FORM

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METHOD OF PAYMENT

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Mail to Student Services, UC Irvine Extension, P.O. Box 6050, Irvine, CA 92616-6050

CONFIRMATION OF ENROLLMENT

You will receive confirmation that you have been enrolled in the course in 3 to 4 days.