Personal Financial Planning Certificate: Accelerated Online Program

May 2021-January 2022 Program Cycle

This rigorous online certificate program is designed for financial professionals with relevant work experience and credentials who are preparing for the CFP® Certification Examination. The 7-course curriculum is comprised of five core courses covering the major disciplines of financial planning, and the required Financial Plan Development Capstone and Ethics courses. This is a cohort based program and enrollment is limited to those who have successfully completed their previous courses. The instructor-led online courses blend live, web-based sessions with online discussion boards, assignments, and testing. Students complete the curriculum within 9 months.

PROGRAM SCHEDULE
Each course (except for the Capstone which meets asynchronously with 3 live sessions) is scheduled over a 4-week period and includes two 3-hour live sessions each week. The weekly live sessions are scheduled on Tuesdays and Thursdays from 3-6pm PST and are also recorded for later viewing. Students are provided a two week window between courses to pre-study materials for the next course.

Core Courses:
Financial Planning Process and Insurance
MGMT X 430.511
May 25-June 17 Reg# 380974

Investment Planning
MGMT X 430.512
July 6-29 Reg# 381071

Income Tax Planning
MGMT X 430.513
August 17-September 9 Reg# 381072

Retirement Planning
MGMT X 430.514
September 28-October 21 Reg# 381073

Estate Planning
MGMT X 430.515
November 9-December 9 Reg# 381074

Required Capstone Course:
Financial Plan Development and Presentation Course
MGMT X 430.516
January 3-28, 2022 Reg# 381075

The capstone course fully meets CFP® Board’s educational standards requiring students to complete a financial plan development course. Completion of this course is required for those who will be sitting for the CFP® Exam under a “Challenge” status.

Required Ethics Course:
Ethics in Personal Financial Planning
MGMT 833.379
August 2-29, 2021, Reg# 381092

Please note additional dates for this course are offered throughout the program cycle.

PROGRAM FEE: $5,165
The program cost includes fees for the five required core courses, Financial Plan Development Capstone course, Ethics course, and the certificate candidacy fee. The program fee does not include the cost for the required pre-study materials, which students must purchase separately.

TO ENROLL
Students must submit an Application for Candidacy with a non-refundable application fee of $200 and enroll in the first course (MGMT X 430.511 Financial Planning Process and Insurance) approximately 1 month prior to the program start date. This will allow ample time to order and pre-study course materials for the first class session. Students are then recommended to enroll in the subsequent courses two weeks prior to each course section.

PROGRAM ORIENTATION
May 21, livestreamed 4-5pm PST
Attend our program orientation to get an overview of what’s to be expected throughout the program, meet your instructors, and ask questions you may have.

ABOUT OUR INSTRUCTORS
This program is taught by highly qualified and motivated instructors who have their CFP® certification and extensive teaching experience.

JOSEPH G. DEVANNEY SCHOLARSHIP
The Joseph G. Devanney Scholarship Fund was created for students pursuing a certificate in Personal Financial Planning at UCLA Extension. One scholarship is awarded per quarter to underwrite full course fees for either of the certificates’ capstone course, MGMT X 430.38 Personal Financial Planning Capstone (PFP), or MGMT X 430.516 Financial Plan Development and Presentation (PFP Accelerated). Visit our scholarship page for more information and application deadlines.

FREE INFORMATION SESSION
Interact with our instructors and staff to learn more about the PFP Accelerated Online Program and CFP® certification. This event is conducted asynchronously online. To participate, students must register and provide a valid email address.
Monday, May 10
Livestream from 10-11am PST
Reg# 381070
For more information call (310) 206-1689 or email pwilliams@uclaextension.edu

CFP® CERTIFICATION EXAMINATION
Students completing this program cycle are eligible to sit for the March 2022 CFP® Certification Examination. Contact the CFP® Board at (800) 487-1497 or visit cfp.net for exam dates and to register for the exam.

Review Course for the CFP® Certification Examination
MGMT 833.374
Students are encouraged to enroll in UCLA Extension’s CFP® Exam Review course to fully prepare for this difficult exam. Visit our course page for more information.

CFP® Exam Review Course for the CFP® Certification Examination

For more information on our program and to enroll please visit: uclaextension.edu/pfp_accelerated

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