

Personal Financial Planning Certificate: Accelerated Online Program

September 2020-April 2021 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 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

September 1-24 Reg# 375403

Investment Planning

MGMT X 430.512

October 6-29 Reg# 375404

Income Tax Planning

MGMT X 430.513

November 17-December 15 Reg# 375889

Retirement Planning and Employee Benefits

MGMT X 430.514

January 12, 2021-February 4, 2021 10 Reg# 375892

Estate Planning

MGMT X 430.515

February 23, 2021-March 18, 2021 Reg# 375893

Required Capstone Course:

Financial Plan Development and Presentation Course

MGMT X 430.516

April 6-29, 2021 Reg# 375894

The capstone course fully meets CFP® Board's educational standards requiring students to complete a financial plan development course. Completion of this course is also 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

May 3-28, 2021, Reg# 376835

PROGRAM FEE: \$4,700

The program cost includes fees for the five required core courses, Financial Plan Development capstone 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.

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 SESSIONS

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.

Wednesday, August 5
Livestream from 10-11am

Reg# 374809

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 **July 2021 CFP® Certification Examination**. Contact the CFP® Board at (800) 487-1497 or visit cfp.net for exam dates and to register for the exam.

CFP® Exam Review

Students are encouraged to enroll in UCLA Extension's CFP® Exam Review Program to fully prepare for this difficult exam. Visit uclaextension.edu/pfp_cfpreview to learn more.



Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER®, and CFP (with flame logo)®, which it awards to individuals who successfully complete initial and ongoing certification requirements.

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