

# Personal Financial Planning Certificate: Accelerated Online Program

April –December 2020 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 6-course curriculum is comprised of five core courses covering the major disciplines of financial planning and the required Financial Plan Development capstone course. 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

April 14-May 7 Reg# [373799](#)

#### Investment Planning

May 26-June 18 Reg# [373803](#)

#### Income Tax Planning

July 7-30 Reg# [373888](#)

#### Retirement Planning and Employee Benefits

August 18-September 10 Reg# [373892](#)

#### Estate Planning

September 29-October 22 Reg# [373895](#)

### Capstone Course:

#### Financial Plan Development and Presentation Course

November 10-December 3 Reg# [373897](#)

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.

### 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. As co-founders of Financial Planning Educational Solutions, a training firm that specializes in personal financial planning and the review course for the CFP® Certification Examination, Ms. Hewitt and Ms. Le Claire have worked with numerous Fortune 500 clients, including Merrill Lynch, Morgan Stanley, and Charles Schwab.

**Linda Hewitt, CFP®, CRPC**, has been a CERTIFIED FINANCIAL PLANNER™ professional practitioner since 1997.

**Nancy Le Claire, CFP®, CPA**, has been a practicing CPA for 20 years and currently owns a tax and financial planning firm.

## 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.

TBD

Reg# [TBD](#)

For more information call (310) 206-1689 or email [pwilliams@uclaextension.edu](mailto:pwilliams@uclaextension.edu)

## CFP® CERTIFICATION EXAMINATION

Students completing this program cycle are eligible to sit for the **March 2021 CFP® Certification Examination**. Contact the CFP® Board at (800) 487-1497 or visit [cfp.net](http://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](http://uclaextension.edu/pfp_cfpreview) to learn more.



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For more information on our program and to enroll please visit [uclaextension.edu/pfp\\_accelerated](http://uclaextension.edu/pfp_accelerated)