

Certificate

Personal Financial Planning

Fully prepare for CFP® Certification while also learning relevant trends and practices in the financial planning field.

Total Units: 32

The Personal Financial Planning program consists of 8 required courses and a 1-day Ethics in Personal Financial Planning seminar. Students must take all courses for letter grade and pass with a program GPA of 2.50 or better. Students are also encouraged to take the 4-week exam prep course before sitting for the Certified Financial Planner (CFP) Certification Exam.

Completion time: 3 quarters (full-time) or 1 to 2-years (part-time)

Eligible for:

International Students
VA Benefits

Introductory

8 Units | 2 Courses

Typically Offered*

COURSE NAME & NUMBER	UNITS	FALL	WINTER	SPRING	SUMMER
Survey of Personal Financial Planning MGMT X 430.31	4.0	Classroom Online	Classroom Online	Classroom Online	Classroom Online
Financial Analysis in Personal Financial Planning MGMT X 430.391	4.0	Classroom	Classroom	Online	Online

Courses may be taken concurrently.

Required

20 Units | 5 Courses, 1 Seminar

Typically Offered*

COURSE NAME & NUMBER	UNITS	FALL	WINTER	SPRING	SUMMER
Investments in Personal Financial Planning MGMT X 430.32	4.0	Online	Online	Classroom	Classroom
Insurance in Personal Financial Planning MGMT X 430.35	4.0	Classroom	Online	Classroom	Online
Income Taxation in Personal Financial Planning MGMT X 430.33	4.0	Classroom	Classroom	Online	Online
Retirement Plans and Other Employee Benefits MGMT X 427.904	4.0	Classroom	Classroom	Online	Online
Estate Planning MGMT X 439.3	4.0	Classroom Online	Classroom Online	Classroom Online	Classroom
Ethics in Personal Financial Planning MGMT 833.379	---	Classroom	Online	Classroom	Online

Capstone

4 Units | 1 Course

Typically Offered*

COURSE NAME & NUMBER	UNITS	FALL	WINTER	SPRING	SUMMER
Personal Financial Planning Capstone MGMT X 430.38	4.0	Classroom	Online	Classroom	Online

Prerequisite: Successful completion of all other seven courses in the certificate.

Exam Prep

This course is not part of the certificate, but is recommended for those taking the exam

Typically Offered*

COURSE NAME & NUMBER	UNITS	FALL	WINTER	SPRING	SUMMER
Review Course for the CFP Certification Exam MGMT X 833.374	---	Classroom Online	Classroom Online	Classroom Online	Classroom Online

Please Note:

An application form and nonrefundable fee are required to establish candidacy in this program. The application & candidacy fee establishes your candidacy in the program for a period of time covering normal progress toward completion, and may allow you to access a variety of program benefits. Payment of the candidacy fee is also required in order to have your transcripts transferred to the CFP Board in order to sit for the exam. [Apply Now](#)

*Courses in this program are typically offered during the quarters and format(s) outlined above. Scheduling is subject to change at any time by UCLA Extension.

Please visit our website for all current course offerings.

Contact Us

310-206-7247

fmpcertificate@uclaextension.edu