PROFESSIONAL CERTIFICATE IN PERSONAL FINANCIAL PLANNING

CFP® LET'S MAKE A PLAN

WHO:
ANYONE WHO WANTS TO HELP INDIVIDUALS AND FAMILIES ACHIEVE THEIR FINANCIAL GOALS

WHAT:

ACCT 308 – Concepts of Federal Income Tax Accounting

FIN 340 – Introduction to Investments

FIN 351 – Introduction to Real Estate

FIN 360 – Principles of Insurance

FIN 408 – Retirement Planning

FIN 409 – Estate Planning

FIN 410 – Theory and Practice of Personal Financial Planning

WHY:

- Learn how to manage debt wisely
- Help clients identify and improve spending and savings habits
- Understand the importance of insurance to manage financial risk
- Recognize opportunities to maximize after-tax income and returns

HOW:

1. Register with the national CFP Board
2. Declare your intent to earn the PFP certificate
3. Complete the required courses at your own pace - note that Finance 408 and 409 should be completed before Finance 410 if possible.

https://youtu.be/IlyEn4QKzTc

WANT MORE INFORMATION?
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