CFP Certification Education Program

This CFP Certification Education Program contains the career knowledge needed by financial planners, as described by CFP Board. This program is offered over an 18-month period at Midlands Technical College Airport Campus and various other locations via interactive conferencing.

CFP certification is a nationally and internationally recognized professional certification. Certified Financial Planner Board of Standards Inc. awards the CFP, CERTIFIED FINANCIAL PLANNER and CFP (with flame design) marks to individuals that fulfill initial and ongoing certification requirements: satisfy the educational requirements, three to five years of work experience in a financial planning field, pass the CFP Certification Examination, compliance with CFP Board's Code of Ethics and Professional Responsibility, continuing education and recertification. **Enroll in all seven courses at a discounted rate of $3,500**

Fundamentals of Financial Planning $695

This course establishes a foundation providing the student with a comprehensive overview of the financial planning process, emphasizing goal and priority setting, data gathering and implementing a financial plan. Also covered is time value of money concepts, financial calculator protocol, legal environment, financial analysis and ethical and professional considerations in financial planning. Approved for 24 hours Insurance CE credit and 3 hour Ethics Insurance requirement. This is the first course in the 2010 CFP (R) Certification Education Program.

Insurance Planning $695

This course is designed to acquaint the student with the basic principles and various types of insurance devices. Approved for 24 hours Insurance CE credit.

Investment Planning $695

This course provides an analysis of investment alternatives in a risk return framework with an emphasis on selection, timing and diversification techniques. Approved for 24 hours Insurance CE credit.

Retirement/Employee Benefits Planning $695

This course provides a complete understanding of the design and planning of retirement needs, including an examination of employer benefits. Approved for 24 hours Insurance CE credit.

Estate Planning $695

This course covers the planning and managing of federal estate and gift problems and opportunities, including topics such as exemptions and asset valuation. Approved for 24 hours insurance CE credit and 3 hour ethics insurance requirement.

Income Tax Planning $695

This course examines the federal income tax system with particular reference to the taxation of individuals. Topics include items of gross income, exclusions from gross income, deductions, tax credits, capital gains and losses, and the taxation of life insurance and annuities. The income taxation of partners and partnerships, as well as corporations and their shareholders, is also covered. The application of income tax laws to the transactions of individuals and businesses is important to financial services professionals in planning for the avoidance, minimization, and deferral of taxation. Prerequisite:

Fundamentals of Financial Planning (PFP610). The need for and use of electronic calculators will be discussed. Approved for 24 hours Insurance CE credit.

Comprehensive Examination Review $695

This course emphasizes the integration of various areas of personal financial planning and planning for diversified clientele. This is the final segment of the 18-month financial planning certificate program.

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