Georgetown University — Center for Continuing and Professional Education

Certificate in Financial Planning

Frequently Asked Questions

How long is the program?
The Certificate in Financial Planning consists of 6 courses that students complete over nine months. The first course, Fundamentals of Financial Planning and Insurance, includes a total of 8 classes, while the following courses run at 6 classes each with the exception of the Capstone Case Course that concludes the program, which has 5 course meetings. Courses must be completed in sequence.

How much does the program cost?
The Certificate in Financial Planning currently costs $5,600.00 for all 6 courses. Textbooks cost extra and run about $1,100.00 during the program. Textbooks may be ordered through Kaplan Schweser. Because textbook editions change frequently, we provide an updated listing approximately 2 weeks before the beginning of each co-hort

What days does the program run on?
Classes take place on Friday nights and all day Saturday. Friday classes begin at 5:00pm and end at 8:35pm. Saturday classes begin at 8:15am and end at 4:35pm. Classes are held on a bi-weekly basis, but may be held on back-to-back weekends depending on holidays. Classes do not meet on holidays.

Where are classes held?
Classes are held at our Arlington Campus located at **3101 Wilson Blvd., Suite 200, Arlington, VA 22201**. We can easily be found on the second floor. Also, we are located across the street from the Clarendon Metro Station. Upon exiting the Metro escalator turn left and cross the street. There is also plenty of parking.

Do you offer the course online?
Currently, Georgetown University does not offer an online CFP course at Georgetown University. Students will need a computer though. Exams, syllabi, and other useful documents are posted online to Blackboard.

What is needed to join the program?
You must apply and be accepted to join the Executive Certificate in Financial Planning program. To apply please click on "Apply Now" link on the website. You will need to complete the application form, provide a $35.00 application fee, upload a resume, and send an original transcript to the address below. Program prerequisites are a bachelor's degree and a minimum of 3 years of professional work experience, preferably in financial services. Individuals are usually alerted about acceptance approximately 3 weeks after applying, once all documents have been received (including your original transcript).

Where should I send my official transcripts?
Official transcripts should be sent to:

Georgetown University
School of Continuing Studies
Department of Admissions
3307 M Street NW
Suite 202
Washington, DC 20057-1006

How many students are there for each co-hort?
The number of students depends on many factors, including the time of year. Each cohort is between 30-50 students. Our largest cohort program is in September.

What is best about your program/why join?
Hands down, the best aspect of the program is our faculty. They have extensive academic and practical experience. Many of the textbooks used in the classrooms have been written by our instructors. While many students throughout the county are using the same textbook, you will be taught by the very author of the book who can explain each section in detail. Also, many of the instructors are very active in the financial planning industry and have their own practices. They remain active in the financial planning community by attending and presenting at national conferences and seminars on the subjects that they teach. It is also important to note that some of the instructors have written parts of the CFP Board of Standards exam and have sat on the CFP Board of Standard examination board.

How do I become a Certified Financial Planner through the Board of Standards?
CFP certificants must meet the four "E"s to become Certified Financial Planners. The first E is the education. You must complete a CFP Board-registered program such as the program at Georgetown University or you can challenge the exam if you hold an advanced degree or designation such as a PhD or CFA. The second E is the exam. You must successfully pass the CFP Board national exam. This exam is given 3 times a year; it is a comprehensive 10-hour exam spanning a Friday night and all day Saturday. The third E is experience. You must have a minimum of 3 years of experience in financial services, generally in a client advising role or supporting clients. Qualifying experience is determined by the CFP Board of Standards so Georgetown University has no authority

to provide feedback as to whether your experience qualifies. CFP certificants can accrue the required experience 10 years before taking the exam or 5 years after taking the exam, so you have a 15-year window to gain the necessary experience. The forth E is ethics. You must sign and abide by the CFP Board Code of Ethics. For more information on the rules and regulations through the Board of Standards, please check their website (www.cfp.net).

But I do not have a financial background. Can I still join the program?
Yes. You do not need a financial background, but we highly recommend it. Approximately 60% of our students have a financial background. The other 40% are not involved in the financial industry. Students spend much time interacting with each other and the instructors. Friendships are built which have lead to successful studying for the Board exam and future career opportunities. As long as you have the determination and willingness to make the time commitment to complete the program, you can succeed. Many students without a financial background have already. Don't let your lack of financial experiences stop you.

Does Georgetown University find job placements after completion of the certificate?
Actually, as discussed previously, our program is just one of several steps that need to be completed to become a Certified Financial Planner. Throughout the program we post career opportunities on our student website from prior alums in the industry, along with numerous contacts. Also, students may also join the Financial Planning Association. Several Georgetown University CFP alums are highly involved in the FPA, which is a great source for networking and career opportunities. We are also in the process of developing a community website for Georgetown University CFP students and alums to interact and provide career assistance.

What if I would like more information about the Certificate in Financial Planning?
First check our website at www.ccpe.georgetown.edu. Next, visit us at one of many Information Sessions presented throughout the year. We post a link to our Information Sessions on our website and we recommend that you RSVP. At each session we discuss important information concerning our program and our presenters include former students and current instructors.