GEORGETOWN UNIVERSITY
SCHOOL OF CONTINUING STUDIES

FINANCE
Spring 2010

Certificate in Financial Planning

Advance your career with the Executive Certificate in Financial Planning from Georgetown University. Differentiate yourself in the eyes of clients by taking the next step to becoming a certified financial planner.

This program is intensive, accelerated, and designed to suit working professionals in the financial sector or those seeking a career transition. Our mix of highly experienced instructors, in-class instruction, tailored materials, and independent course work prepares professionals to sit for the rigorous CFP examination offered by the Certified Financial Planner Board of Standards Inc. In addition, the program offers opportunities to meet professionals and make contacts in the growing financial services industry. The Executive Certificate in Financial Planning is a board-registered program with CFP Board of Standards and fulfills the educational requirements of CFP® certification. It is a nine-month part-time program offered in partnership with Kaplan Schweser™.

Designed For

- Financial planners seeking professional advancement;
- Career changers seeking new career paths;
- Retirees and/or individuals with strong interest in managing and achieving their personal financial goals.

Benefits

Employment of financial analysts and personal financial advisors is expected to grow much faster than the average for all occupations. Growth will be especially strong for personal financial advisors, which are projected to be among the 10 fastest growing occupations. - **(United States Department of Labor – Bureau of Labor Statistics[1])**

41 percent job growth during the 2006-16 decade[1]

In addition, financial advisor income in the year after CFP certification has consistently been appreciably higher than income prior to certification.

Finally, the CFP designation is recognized by consumers at a significantly higher rate compared to other financial services designations.

Faculty

Michael Dalton, Ph.D., JD, CPA, CLU, ChFC, CFP®

David Durr, Ph.D., CFA, CFP®

Thomas Langdon, JD, LL.M., CFA, CFP®

James Dalton, MBA, MS, CPA/PFS, CFA, CFP®

Registration

CCPE.GEORGETOWN.EDU
Please visit us online for course descriptions, faculty bios, and online application.

202.687.7000
You may also call to speak with a program advisor.

Location & Times

Courses take place at the Georgetown University Clarendon Campus
3101 Wilson Blvd,
Suite 200,
Arlington, VA 22201

Across from the Clarendon Metro station on the Orange Line

Courses meet on Fridays from 5:00pm to 8:30pm, and Saturdays from 8:15am to 5:00pm

Tuition

Total certificate tuition	$5,600.00 Plus the cost of textbooks (approx. $1,000.00)

Contact the CCPE office for group registration rates.

Required Courses

Fundamentals of Financial Planning	51hrs	January 15, 16, 29, 30 February 12, 13, 26, 27
Investment Analysis and Portfolio Management	38hrs	March 12, 13, 26, 27 April 9, 10
Taxation of Persons, Property and Other Entities	38hrs	April 23, 24 May 7, 8, 21, 22
Retirement and Employee Benefits	38hrs	June 4, 5, 18, 19, 25, 26
Estate Tax Planning	34hrs	July 9, 10, 23, 24 August 6, 7
Capstone Course in Financial Planning	30hrs	August 7, 20, 21 September 3, 4

Actual Student Quotes

"Thank you! Certainly exceeded expectations"

"Fantastic class – one of the best professors I've had."

"I gained more knowledge than expected from the course, especially (from) the instructor."

"Exposure to the CFP material; covered a lot of ground"

"Impressive teacher. One of the best I have had and he has a lot of current relevant knowledge on the subject"

"Outstanding – I have learned so much! Thank you."

"Excellent class – Great instructor"

"Great course, thanks. It was very worthwhile"

– September 2009 co-hort student evaluations

**Certified Financial Planner Board of Standards Inc. owns the marks CFP, CERTIFIED FINANCIAL PLANNER™, and CFP® in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements.*

CPD does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNING™, and CFP certification marks. CFP certification is granted only by Certified Financial Planner Board of Standards Inc. to those persons who, in addition to completing an educational requirement such as this CFP Board-Registered Program, have met its ethics, experience and examination requirements.

The Georgetown University Center for Continuing and Professional Education is an educational affiliate of the Financial Planning Association National Capital Area Chapter.

Prerequisites

Participants in the certificate program must have a four-year degree and three years of experience in financial services, or three years of experience in a supervisory or executive position in the government or a non-financial services company.

Certificate Requirements

To earn the Executive Certificate in Financial Planning students must complete the six required courses totaling 229 contact hours. Students have two years to complete the certificate requirements. Upon completion of the program students receive an Executive Certificate in Financial Planning from Georgetown University and are eligible to sit for the national *CFP®* Board exam.

Continuing Education Units (CEUs)

A minimum of 22.9 CEUs or 229 contact hours must be earned to obtain the Executive Certificate in Financial Planning.

Application and Registration

The application consists of an application form, $35 application fee, one original transcript from an accredited undergraduate or graduate institution, and a brief resume. All documents must be submitted for consideration by the admissions committee. If admitted, participants are expected to complete the courses sequentially. For further program details, please call (202) 687-7000 or visit ccpe.georgetown.edu