



Certificate in Financial Planning (CFP)
Frequently Asked Questions

How long is the program?

The Certificate in Financial Planning consists of six 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 class meetings. Courses should be completed in sequence to obtain the maximum learning benefit. The program is designed to finish two months before the CFP Exam to give students time to prepare for the exam.

How much does the program cost?

Tuition for the Certificate in Financial Planning is \$6,225 for all 6 courses. Students can register for courses individually over the duration of the program. However, students that register for all six courses before the program start date receive a 50% tuition discount on the final course, the Capstone Case in Financial Planning, making the effective tuition cost \$5,600. The course discount code is posted on our website and expires on the first day of the program. In addition, students who register for the six courses before the beginning of the program are also eligible for our interest-free payment plan, which allows students to pay in three installments over a six-month period.

Are the costs of textbooks included in the tuition?

Textbooks are not included in the cost of tuition. Textbooks will cost \$700 - \$1,000 over the duration of the program. Textbooks may be ordered through Kaplan Schweser, Pearson, and Money Education. Because textbook editions change frequently, we provide an updated listing approximately two weeks before the beginning of each semester.

How can I pay for the program?

There are several funding sources. First, many employers have tuitions assistance programs as a benefit for employees. Employers may also have a professional development budget earmarked for employees. We encourage you to ask you employee about these benefits. Secondly, some students use student loans. The program is no eligible for federal loans since it is a professional non-credit certificate program. However, students can seek loans from private financial institutions. Finally, the program is eligible for Veteran's Benefits if you are an eligible veteran. Georgetown University does not provide financial aid or scholarships for the program since it is a professional non-credit certificate program. For more information, please visit our webpage on [Funding Resources](#).

What days do courses meet?

Classes take place on Friday nights and all day Saturday. Friday classes begin at 5:10pm and end at 8:45pm. 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 the Center for Continuing & Professional Education in Arlington, VA. The Arlington Campus is located at **3101 Wilson Blvd., Suite 200, Arlington, VA 22201**. The campus is on the second floor of the building. 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 a parking garage underneath the building.

Do you offer the program online?

Georgetown University does not offer an online version of its CFP program. However, students will need a computer to complete the program since exams, assignments, syllabi, and other useful documents are posted online to Blackboard, our student website.

What is needed to join the program?

Our program is open to all interested in learning about financial planning. Minimum requirements are a bachelor's degree, or expected completion of a bachelor's degree. We prefer that students have three years of professional work experience. Work experience can be in any industry or sector. A TOEFL examination for non-native speakers of English is not required but students are expected to read, write and comprehend English at the graduate level to fully participate in and gain from our program. Most exams in the program are administered online. Therefore, access to a computer with internet connectivity is a program requirement.

How many students are there each semester?

The number of students depends on many factors, including the time of year. Program start dates are April and September. Each cohort is between 30-50 students. Our largest cohort program is typically in September.

What is best about your program? Why join?

The best aspect of the Certificate in Financial Planning program is our faculty. They have extensive academic and practical experience, and are industry thought leaders. They have taught together at Georgetown University for 10 years. Many of the textbooks used in class have been written by our instructors. While many students throughout the county are using the same textbook, you will be taught by the authors of the book. Also, many of the instructors are 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 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 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 three 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 ten years before taking the exam or five years after taking the exam, so you have a 15-year window to gain the necessary experience. The fourth E is ethics. You must sign and abide by the CFP Board Code of Ethics. To obtain the designation of becoming a registered CFP you must have received a bachelor's degree or above. 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 background in finance. Financial planning is an industry that is very open to career changers. About 60% of our students have experience in finance while 40% are not involved in the financial industry. Students spend much time interacting with each other and the instructors. Networking is a critical component of the program. Students and graduates have formed study groups for the CFP Board exam and have been a source of career opportunities. The most important determinant of success in the program is making the time commitment to complete the program. Many students without a background in finance have succeeded.

Does Georgetown University find job placements after completion of the certificate?

While CCPE does not have a career placement office, the Center regularly receives career opportunities from local and national financial services firms. These career opportunities are posted to Blackboard. Also, we encourage students to join the Financial Planning Association (FPA). 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?

Please visit our website at ccpe.georgetown.edu, where we have posted a webinar, schedules, and textbook lists, course descriptions, and faculty bios. If you'd like additional information, we encourage you to sit in on a class for an hour. This will give you an opportunity to meet faculty and students first-hand. You can also meet with one of our program advisors. To make arrangements, please call 202.687.7000.