GEORGETOWN UNIVERSITY
SCHOOL OF CONTINUING STUDIES

MANAGEMENT
Spring 2012

Certificate in Financial Planning

Financial Planning 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 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.

30 percent job growth during the 2008-18 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®

[1]United States Department of Labor – Bureau of Labor Statistics.

Registration

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

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 Friday evenings and Saturdays

Tuition

Total certificate tuition	$5,600.00 With early registration discount
Textbook costs	approx. $1,000.00

Contact the CCPE office for group registration rates.

Required Courses

Fundamentals of Financial Planning	Spring 2012
Investment Analysis and Portfolio Management	Spring 2012
Taxation of Persons, Property and Other Entities	Spring 2012
Retirement and Employee Benefits	Spring 2012
Estate Tax Planning	Spring 2012
Capstone Course in Financial Planning	Spring 2012

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."

– Georgetown University Certificate in Financial Planning 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.*

CCPE 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

A bachelor's degree or the equivalent. Those in the process of completing a bachelor's degree may also register. A minimum of three years of professional work experience is preferred, though exceptions are possible.

Certificate Requirements

To earn the 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 a 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.

Registration

Please register online at ccpe.georgetown.edu.

Once there go to Certificate Programs – Financial Planning. You may choose to register for all courses at once or register for individual courses.

Register for the six required courses in one transaction before the start of the program to receive discounted tuition.

If you have any questions please call (202) 687-7000 or email ccpefinancialplanning @georgetown.edu.