

Textbooks for Financial Planning Program

January 2012 Program

READ BEFORE PURCHASING TEXTBOOKS

There are (6) modules within our program. Please order only those texts that correspond with the module you are currently taking (i.e. Fundamentals followed by Investments etc). Please note that prices, textbooks and editions are subject to change without notice. **Textbook orders should be placed 2-3 weeks prior to the start of each module to ensure you receive the appropriate textbook and edition.**

To order the Kaplan Schweser textbooks, please call **866.963.8329**. A **10% discount** will be applied to the Theory & Practice and Cases & Applications textbooks if you supply your university discount code at the time of purchase. To obtain your **university discount code** please contact your University Program Director or Kaplan Schweser Representative.

Fundamentals of Financial Planning and Insurance

- *Personal Financial Planning Theory and Practice, 7th Edition, (Kaplan Schweser) - Price: \$99 (plus shipping). To order this textbook call Kaplan Schweser at **866-963-8329***
- *Understanding Your Financial Calculator, 4th Edition, James F. Dalton (Kaplan Schweser) – Price \$49 (plus shipping). To order this textbook call Kaplan Schweser at **866-963-8329***

Investment Planning

- *Fundamentals of Investing, 11th Edition, Lawrence Gitman, Michael Joehnk and Scott Smart (Addison Wesley) (the purchase of the OTIS student kit is optional) - Price: Varies (Purchase at Amazon or Pearson). To order this textbook call Pearson at **800-947-7700** or www.pearsonhighered.com*

Income Tax Planning

- *Income Tax Planning for Financial Planners, 5th Edition, Author/Editor Michael A. Dalton (ME – Your Money Education Resource) - Price: \$118 (plus shipping) – To order this textbook call Money Education at **888-295-6023** or www.money-education.com (**NOTE:** Edition may be updated prior to class start)*

Retirement Planning

- *Retirement Planning and Employee Benefits for Financial Planners, 8th Edition, Author/Editor Michael A. Dalton (ME – Your Money Education Resource) - Price: \$123 (plus shipping) – To order this textbook call Money Education at **888-295-6023** or www.money-education.com (**NOTE:** Edition may be updated prior to class start)*

Estate Planning

- *Estate Planning for Financial Planners, 6th Edition, Author/Editor Michael A. Dalton (ME – Your Money Education Resource) - Price: \$113 (plus shipping) – To order this textbook call Money Education at **888-295-6023** or www.money-education.com (**NOTE:** Edition may be updated prior to class start)*

Capstone Case Course

- *Personal Financial Planning Cases and Applications, 7th Edition, Michael A. Dalton and James F. Dalton (Kaplan Schweser) - Price: \$93 (plus shipping). To order this textbook call Kaplan Schweser at **866-963-8329***

Highly Recommended Supplemental Tools for the Financial Planning Certificate Program

Essential Study Solution – Included in this package:

- o *Volumes I-VI – Study Guides for CFP® Certification Examination, 2011 - Edition*
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- o *Online QBank with more than 5,000 questions to test your knowledge in each of the modules*
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