Executive Certificate in Financial Planning

Professional Development Certificate Program

For more than eight years, the Executive Certificate in Financial Planning, a CFP® Board-approved program, has provided students with in-depth financial planning theory and practice concepts, preparing them for the CFP® exam.

Overview
The Executive Certificate in Financial Planning provides students the insightful review and preparation needed to sit for the CFP® exam, which they are eligible to do when they successfully complete the program. The comprehensive certificate curriculum is taught by CFP®-certified professionals.

According to Money magazine and Payscale.com, demand for personal financial advisers is expected to grow 41 percent by 2016.

Intended Audience
Students in this program work in the financial services industry, including investment brokers, financial advisers and tax preparers. Other students enroll to gain the knowledge needed to plan and manage their own financial future.

Program Objectives
- Prepare students for the CFP® exam
- Teach effective CFP® exam preparation methods
- Provide a comprehensive financial planning curriculum, including insurance, investment, income tax, retirement, employee benefits and estate planning subject matter

Cost and Length of Study*
The certificate consists of six courses and costs $5,400, not including textbooks. Textbooks cost $499. Each cohort begins either fall or spring and meets every other weekend (Friday evening/all day Saturday). The program is nine months in length. To earn the certificate, and be eligible to sit for the CFP® exam, students must successfully pass all courses.

*Subject to change
Executive Certificate in Financial Planning

**Curriculum**

<table>
<thead>
<tr>
<th>Topics covered</th>
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<tbody>
<tr>
<td>Fundamentals and Ethical Considerations and Insurance and Employee Benefits</td>
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<tr>
<td>Investment Planning</td>
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<tr>
<td>Retirement Planning</td>
</tr>
<tr>
<td>Income Tax Planning</td>
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<tr>
<td>Estate Planning</td>
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<tr>
<td>Capstone Case Course in Financial Planning</td>
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**Professional Credit: Continuing Education Units**
Credit is recorded as continuing education units (CEUs), which provide a standard of measurement for nondegree educational experiences. CEUs cannot be applied to a degree. The certificate is 19.2 CEUs.

**Admissions**
There is no formal application or admissions process for this program. Interested students simply register and pay for courses they wish to take. In-person and virtual information sessions are scheduled prior to each cohort.

**Requirements**
Students must have completed an undergraduate degree to be eligible to enroll in the program.

Please note: To be able to use the CFP® mark, CFP® certification and a minimum of three years of work experience is required. The work experience can be earned within five years of passing the CFP® exam.

**KAPLAN SCHWESER**
The Executive Certificate in Financial Planning is offered in partnership with Kaplan Schweser, the leading provider of financial planning and educational materials. Kaplan Schweser has helped more than 12,000 financial professionals pass the CFP® Certification Exam.

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