

DEPAUL UNIVERSITY

CONTINUING AND PROFESSIONAL EDUCATION

e-FINANCIAL PLANNING CERTIFICATE PROGRAM



LIVE. INSTRUCTOR LED. INTERNET DELIVERED.



THE FINANCIAL PLANNING EDUCATION CENTER

DePaul University's Financial Planning Education Center is a leader in continuing education and training for financial service professionals. The largest classroom provider of financial planning education in the Midwest, the Financial Planning Education Center offers programs for both experienced professionals and career changers. The Financial Planning Education Center has helped more than 2,200 professionals further their financial education and has provided several corporations with customized, on-site training for their staff.

WHO SHOULD ATTEND

This program is right for anyone pursuing the CFP® certification, including professionals who are in the fields of investment brokerage, insurance, banking, accounting, and the law. Through a thorough, rigorous course of study, you'll be prepared to take the CFP® Certification Examination. Because CFP Board requires individuals to have an undergraduate degree before they can claim the CERTIFIED FINANCIAL PLANNER™ credentials, we strongly recommend that students have a four-year degree before enrolling in the program.

HOW YOU WILL BENEFIT

DePaul's Financial Planning Certificate program is the largest, most successful, and longest-running financial planning program in the Chicago area. Now, with this "e" version, professionals anywhere in the country can receive a high quality education from a renowned university known for its rigorous, yet practical, programs.

As an "e" participant, you will:

- Gain thorough knowledge of financial planning through a rigorous curriculum designed not only for passing the CFP® Certification Examination, but also for successful real-world application.
- Learn from the best instructors in the country.
- Complete the education requirement for the CFP® Certification Examination in only nine months.
- Attend class from the convenience of your home or office: no need to travel, fight traffic, worry about parking, or leave work early to attend class.

Upon successful completion of the program, you'll receive a certificate of professional achievement from DePaul University and will be eligible to sit for the CFP® Certification Examination.

PROGRAM LOGISTICS

Transfer and exemption policy- You may transfer credit from another CFP Board-registered program for up to two courses and receive a tuition discount from the total program cost. Also, certain credentials, along with the right experience, might exempt you from one course.

Fees- Tuition for the five-course curriculum is \$4,500, plus books and materials.

e-FINANCIAL PLANNING CERTIFICATE PROGRAM

At last, a program that delivers the education you're looking for, when and where it's convenient.

Recently, the U.S. Department of Labor predicted that employment opportunities for financial planners would likely grow 41 percent between 2006 and 2016. The future is bright for a career in financial planning, and now DePaul is making this future more readily accessible.

Our "e" program—live, instructor-led, Internet-delivered—gives participants a valuable distinction in the marketplace, while preparing them for the CFP® Certification Examination.

You'll learn how to plan, assess, and evaluate a client's financial future through the development of a comprehensive financial plan. A rigorous curriculum—taught by expert practitioners and instructors—covers the many different facets of financial planning, including insurance, investments, income tax, retirement and employee benefits, and estate planning.

PROGRAM OVERVIEW

The program—offered in conjunction with Dalton Education, a leading provider of financial planning and education materials—is an accelerated, rigorous course of study that can be completed in only nine months. Unlike most distance learning options, this is not a self-study program; rather, classes are conducted live over the Internet.

From anywhere in the country, students with Internet access can attend "virtual classrooms" and interact with instructors and other students using a headset and

voice-over-IP technology. The program also features at least five hours of archived lectures per course, allowing students to customize their participation and spend as much or as little time as they want on featured subjects.

This program is registered with the Certified Financial Planner Board of Standards, Inc. (CFP Board) to fulfill the educational component required for professionals preparing to sit for the CFP® Certification Examination.

Certified Financial Planner Board of Standards Inc. owns the marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP (with flame logo)® in the U.S., which it awards to individuals who successfully complete initial and ongoing certification requirements. DePaul University does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP (with flame logo)® 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.



PROGRAM CONTENT

The e-Financial Planning Certificate program includes five core courses that meet for two two-hour sessions or two three-hour sessions per week. In addition, at least five hours of archived lectures are available per course to help participants build a foundation of key concepts before attending class.

FUNDAMENTALS OF FINANCIAL PLANNING AND INSURANCE PLANNING

In this course, you'll learn about the theory and practice of financial planning. The course's topics cover insurance—life, health, disability, long-term care, property, Social Security, and personal liability insurance—as well as the time value of money, education planning, and retirement funding. A financial calculator (such as an HP 12C or 10BII) is required.

INVESTMENT ANALYSIS AND PORTFOLIO MANAGEMENT

This course introduces participants to modern portfolio theory, risk reduction, debt and equity securities, derivatives (including options and futures contracts), and asset allocation strategies. You'll learn how to determine a client's goals and risk tolerance and to select appropriate assets.

TAXATION OF PERSONS, PROPERTY, AND OTHER ENTITIES

Focusing on the taxation of individuals, sole proprietorships, C-corps, S-corps, partnerships and LLCs, this course provides detailed coverage of gross income inclusions, exclusions, deductions before and after adjusted gross income, and tax credits. In addition, you'll learn techniques for taxation avoidance and minimization.

RETIREMENT PLANNING AND EMPLOYEE BENEFITS

In this course, you'll receive a comprehensive overview of qualified—defined benefit, profit share, 401(k) plans—and non-qualified—deferred compensation, incentive stock options, employee stock purchase plans—retirement plans, other tax-advantaged plans—SIMPLE, Roth and traditional IRAs—and employee benefits. This course also presents core information about Social Security, disability and health care programs such as Medicare.

ESTATE PLANNING

You will get an introduction to wills, trusts, the probate process, and the taxation of estates. Course participants also learn the tax implications of gifts and bequests during lifetime and at death, as well as techniques for taxation avoidance and minimization.

Visit Our Website

For online registration and course information, please visit our website: cpe.depaul.edu/fpec

Program Contact

Dorothy Jagonase - Program Manager
(312) 362-5321
djagonas@depaul.edu