

Personal Financial Planning Certificate: Accelerated Online Program

September 2023-April 2024 Program Cycle

This rigorous online certificate program is designed for financial professionals with relevant work experience and credentials who are preparing for the CFP® Certification Examination. The 7-course curriculum is comprised of five core courses covering the major disciplines of financial planning and the required Financial Plan Development Capstone and Ethics courses. This is a cohort based program and enrollment is limited to those who have successfully completed their previous courses. The instructor-led online courses blend live, web-based sessions with online discussion boards, assignments, and testing. Students complete the curriculum within 9 months.

PROGRAM SCHEDULE

Each course (except for the Capstone which meets asynchronously with 3 live sessions) is scheduled over a 4-week period and includes two 3-hour live sessions each week. The weekly live sessions are scheduled on Tuesdays and Thursdays from 3-6pm PT and are also recorded for later viewing. Students are provided a two week window between courses to pre-study materials for the next course.

Core Courses:

Financial Planning Process and Insurance

MGMT X 430.511

September 26-October 19, 2023 Reg# [394440](#)

Investment Planning

MGMT X 430.512

October 24-November 16, 2023 Reg# [394579](#)

Income Tax Planning

MGMT X 430.513

November 28-December 21, 2023 Reg# [394590](#)

Estate Planning

MGMT X 430.515

January 9-February 1, 2024 Reg# [394591](#)

Retirement Planning

MGMT X 430.514

February 13-March 7, 2024 Reg# [394592](#)

Required Capstone Course:

Financial Plan Development and Presentation Course

MGMT X 430.516

April 23-May 21, 2024 Reg# [394593](#)

The capstone course fully meets CFP® Board's educational standards requiring students to complete a financial plan development course. Completion of this course is also required for those who will be sitting for the CFP® Exam under a "Challenge" status.

Required Ethics Course:

Ethics in Personal Financial Planning

MGMT 833.379

TBA

Please note additional dates for this course are offered throughout the program cycle.

PROGRAM FEE: \$5,850

The program cost includes fees for the five required core courses, Financial Plan Development capstone course, Ethics course, and the certificate candidacy fee. The program fee does not include the cost for the required pre-study materials, which students must purchase separately.

TO ENROLL

Students must submit an [Application for Candidacy](#) with a non-refundable application fee of \$200 and enroll in the first course (MGMT X 430.511 Financial Planning Process and Insurance) approximately 1 month prior to the program start date. This will allow ample time to order and pre-study course materials for the first class session. Students are then recommended to enroll in the subsequent courses two weeks prior to each course section.

7-3-23. Not printed at state expense. Printed on recycled paper.

PROGRAM ORIENTATION

Thursday, September 7, 2023, livestreamed 4:00-5:00pm PT

Attend our program orientation to get an overview of what's to be expected throughout the program, meet your instructors, and ask questions you may have.

ABOUT OUR INSTRUCTORS

This program is taught by highly qualified and motivated instructors who have their CFP® certification and extensive teaching experience.

JOSEPH G. DEVANNEY SCHOLARSHIP

The Joseph G. Devanney Scholarship Fund was created for students pursuing a certificate in Personal Financial Planning at UCLA Extension. One scholarship is awarded per quarter to underwrite full course fees for either of the certificates' capstone course, MGMT X 430.38 Personal Financial Planning Capstone (PFP), or MGMT X 430.516 Financial Plan Development and Presentation (PFP Accelerated).

For more information, application deadlines, or to apply visit our [scholarship](#) page.

CFP® CERTIFICATION EXAMINATION

Students completing this program cycle are eligible to sit for the **July 2024 CFP® Certification Examination**. Contact the CFP® Board at (800) 487-1497 or visit [cfp.net](#) for exam dates and to register for the exam.

Review Course for the CFP® Certification Examination

MGMT 833.374

Students are encouraged to enroll in UCLA Extension's CFP® Exam Review course to fully prepare for this difficult exam. Visit our course [page](#) for more information.



Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER®, and CFP (with flame logo)®, which it awards to individuals who successfully complete initial and ongoing certification requirements.

For more information on our program and to enroll please visit:

uclaextension.edu/pfp_accelerated