UCF’s Certified Financial Planner™ Certification Education Program

UCF’s Certified Financial Planner™ Certification Education Program is a CFP Board-Registered Program. Individuals who successfully complete our program will fulfill the CFP Board 270 contact hour minimum education requirement* and become eligible to sit for the CFP® Certification Exam.

UCF’s program meets the needs of professionals who plan, assess, and evaluate a client’s financial future through the development of a comprehensive financial plan. Our courses are taught by financial service professionals who provide current information in a variety of financial planning areas.

OUR COURSES

• General Principles (FP100) 38 hrs
• Insurance Planning (FP200) 38 hrs
• Investment Planning (FP300) 38 hrs
• Income Tax Planning (FP400) 38 hrs
• Retirement Planning (FP500) 38 hrs
• Estate Planning (FP600) 38 hrs
• Capstone (FP700) 45 hrs

* Total Contact Hours: 273

In today’s rapidly changing economic climate, people need more help than ever in making the right choices to plan for and protect their financial futures. We live in a prosperous society with greater longevity and, therefore, require more investment advice and sound financial guidance.

Whether you’re currently employed in the financial services industry or want to pursue a career in this diverse and quickly changing profession, this certificate program will provide the knowledge and skills you need to help clients meet their financial objectives. By completing the education portion of the CFP Board requirement for the CFP® certification, you will be more valuable to your clients and employers.

Who Should Attend?

• Financial Planners
• Insurance Agents
• Retirement Plan and Employee Benefits Specialists
• Investment Advisors and Brokers
• Accountants
• Bankers
• Trust Officers
• Anyone considering a career in financial planning

Objectives

• Deliver comprehensive financial planning instruction with an emphasis on quality client service
• Provide the educational requirements needed to sit for the CFP® Certification Examination
• Provide professional networking

Call 407-882-0260 or visit www.ce.ucf.edu/cfp

Discounts available to UCF Alumni and FPA Members!
The UCF Certified Financial Planner™ Certification Education Program

GENERAL PRINCIPLES (FP100) 38 HRS
Comprehensive overview of financial planning fundamentals. Topics include: financial planning functions; the legal and economic environment; methods of gathering client data; time value of money; ethical and professional considerations; financial analysis; and understanding, implementing, monitoring and reviewing a comprehensive financial plan. Participants gain experience constructing personal financial statements, business structures for clients, budgeting, and dealing with regulatory requirements.

INSURANCE PLANNING (FP200) 38 HRS
Familiarizes students with the principles of insurance and provides the background, skills and technical ability to analyze and evaluate aspects of risk and exposure. Topics include: identifying risk exposures, legal aspects of insurance, property and liability policy analysis, employee benefits and social insurance. Prepares students to identify risk exposure and selecting the best option to protect clients against loss. Provides practical knowledge of the types of life insurance policies; life insurance needs analysis; medical, disability and casualty insurance; and Social Security benefits.

INVESTMENT PLANNING (FP300) 38 HRS
Develops skills to effectively evaluate various investment vehicles in accordance with client investment objectives. Topics include: regulation of markets, investment vehicles, investment theory, real estate investment, international investment, analysis of risk and return, financial markets, and modern portfolio theory. Prepares students to work with clients to structure an investment portfolio reflecting the client’s life circumstances and objectives.

INCOME TAX PLANNING (FP400) 38 HRS
 Provides a comprehensive coverage of federal income taxation and supplies participants with information and techniques critical for effective tax planning. Topics include: ethical issues, tax law research, terminology, tax computations and concepts, hazards, and penalties. Introduces methods of gathering client information, reviewing clients’ past returns, and minimizing tax payments legally. Covers tax management techniques, tax implications of divorce, employee benefits and investment, financial planning strategies, business structures, sale of personal residence, and passive activity loss rules.

RETIREMENT PLANNING (FP500) 38 HRS
Provides a comprehensive study of personal and employer-sponsored retirement plans and familiarizes students with methods of gathering information and selecting appropriate options to achieve client retirement goals. Topics include: ethical issues in retirement planning and employee benefits, IRAs, the role of Social Security and Medicare Benefits, tax-sheltered annuities, qualified retirement plans, distributions and distribution options, taxation of benefits, group insurance, and factor analysis.

ESTATE PLANNING (FP600) 38 HRS
Provides an overview of estate planning and knowledge of the various methods, tools and techniques necessary to develop effective estate plans. Topics include: federal and estate gift taxation, gift and estate planning techniques, trusts, life insurance as an estate planning tool, intra-family business and property transfers, charitable transfers, planning for incapacity, and divorce planning. Also covers wills, trusts, powers of attorney and probate.

CAPSTONE (FP700) 45 HRS
Thorough, timely review and application of all material covered in the six core courses through complex, broadly based case studies and practical application of critical knowledge, skills and concepts to develop sound financial plans and advice in preparation for the CFP® Certification Examination. Prepares students to analyze complex situations, practice application at the evaluation level of cognitive ability, update their knowledge regarding new legislation or regulations affecting the financial planning field, and develop sound plans in response to realistic situations.

OUR INSTRUCTORS

Tim Hummel, CFP  
Steve Newman, CFP

AUDIT STUDENTS
To audit a course from UCF’s Certified Financial Planner™ Education Program, you must provide proof of prior course work by sending transcripts to UCF Continuing Education. Upon completion of an audited course, UCF will not award a grade or certificate. The purpose of auditing a course is to obtain knowledge to better prepare in a specific area.

CHALLENGE STATUS AND TRANSCRIPT REVIEW

Challenge Status
To challenge the educational requirement, candidates must hold a specific academic degree or professional credential accepted by the CFP Board and complete the Capstone course (FP700) through the education program.

Transcript Review
Certain industry credentials recognized by CFP Board, or the successful completion of upper-division level college courses, may satisfy some or all of the education requirement set by CFP Board.

INSURANCE CONTINUING EDUCATION
The six core courses are approved by the Florida Department of Financial Services to provide Insurance CEUs to any student with a valid FL Insurance license. The student must complete all contact hours in a course in order to be eligible to receive CEUs.

To obtain CFP Board’s Guide to CFP® Certification or request information, call toll free 800-487-1497 or mail@cfpboard.org.

Website: www.cfp.net/become

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