UCF’s CFP® Certification Professional Education Program is a CFP Board-Registered Program. Individuals who successfully complete our program will fulfill the CFP Board 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 and are taught by financial service professionals employed in the field.

OUR COURSES

• Fundamentals & Insurance (FP100/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) 38 hrs
• Live Review Course 4 Days Wednesday - Friday - In-Person Times TBD

* Total Contact Hours: 228

Program Tuition includes:

- **Live Instructor Led Program** to keep you on track
- **Printed Materials:** Textbooks and spiral bound copies of student slides for each course.
- **Online access** to recorded pre-study lectures and pre and post course assessments to test progress before and after each course
- **Online** quizzes, midterms and finals automatically scored
- **Capstone Course** - uses case studies and financial planning software to give you real world examples in preparation for putting together a client financial plan
- **Bundle the CFP Program** with the live CFP review program held in Orlando, FL to prepare for the CFP® exam
- **Network** with Financial Planning Professionals and career opportunities and build professional relationships

**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

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

Discounts available to UCF Alumni and FPA Members!

In partnership with UCF Continuing Education, Dalton Education offers quality educational materials to financial professionals to assist in their journey to become a CFP® professional.
FUNDAMENTALS & INSURANCE (FP100/FP200) 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.

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) 38 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 INSTRUCTOR
Steve Newman, CFP
Steve graduated from Brandeis University with a B.A. in Politics, after which he entered the financial services world. He has been working in the financial services for over 30 years with various firms. Steve successfully completed the Certified Financial Planning Program and successfully passed the national examination, to earn the right to be called a CERTIFIED FINANCIAL PLANNER™ Professional.

AUDIT STUDENTS
To audit a course from CFP® Certification Professional Education Program, you must provide proof of prior course work from Dalton Education by sending transcripts to UCF Continuing Education. Upon completion of an audited course, UCF will not award a grade or certificate for audited courses. The purpose of auditing a course is to obtain knowledge to better prepare in a specific area. Please contact CE to review your situation and tuition fee for pending courses.

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

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® in the U.S., which it awards to individuals who successfully complete CFP Board’s initial and ongoing certification requirements.