Review Primer for the CFP® Certification Examination
This 4-day review primer provides an “extra step” for those who are preparing for the CFP® Certification Examination. The curriculum includes strategies for approaching case studies and accompanying questions, advanced calculator usage and problems, and test-taking techniques and methodology. This course is recommended to be taken in conjunction with the 6-day review course.

Management 833.378AB  3.1 CEU  Reg# 254977Q

Classroom Sessions: Sat & Sun, 8am-6pm, Apr 25 & 26
Westwood: G33E UCLA Extension Bldg., 10995 Le Conte Ave.

Online Sessions: Wed, Thu, Sat & Sun, Apr 29; May 2, 3, 6 & 7

Through Mar 25: $495 / After: $545
Discounted fee through Mar 25 for PFP certificate students: $395 / After: $445

Review Course for the CFP® Certification Examination
This 6-day course provides an extensive review of topics that form the basis of the CFP® Certification Examination. The live instructor-led classroom environment helps build self-confidence and increase knowledge while providing immediate feedback from the instructors and other participants. Class exercises review several case studies and employ the necessary techniques to approach the various types of exam questions.

Management 833.374  5.1 CEU  Reg# 254720Q

Fri, Sat & Sun 8am-6pm, Jun 12, 13, 14, 26, 27 & 28, 6 mtgs
Westwood: 320, 1010 Westwood Center, 1010 Westwood Blvd.

Course fee: $1,150
Discounted fee for PFP certificate students: $1,000

Early enrollment is advised as enrollment is limited. Students are highly encouraged to purchase, at an additional cost, the Keir review course study materials and read them prior to the live review.

Instructors:
Nancy J. Le Claire, BA, CPA®, CFP®
Linda L. Hewitt, BS, CRPC, CFP®
Co-Founders of Financial Planning Educational Solutions, a training firm that specializes in personal financial planning educational programs and the CFP® Exam Review Course.

CFP® Certification Examination Information
Exam Date Testing Window: July 28-Aug 1, 2015
Visit cfp.net for more information and to register for the CFP® Exam.
General Information

Keir Course Materials
You are highly encouraged to buy (at an additional cost) the Keir review course pre-study materials and read them prior to the live review.

To purchase the CFP® Certification Examination Basic Review Package from Keir Educational Resources, call (800) 795-5347.

Identify yourself as a UCLA Extension student.

Repeat Policy
You are eligible to repeat the next scheduled review course and/or review primer (space permitting) for a $75 retake fee per course.

CPE Credit
These courses may be applied toward the State of California’s continuing professional education (CPE) requirement for the re-licensure of Certified Public Accountants.

Refunds
A service charge of $30 is withheld from all refunds (full refund if course is canceled, discontinued, or rescheduled). Refund requests must be postmarked or phoned in by the last business day before the first class meets (no refunds after this date).

Parking
For more information call (310) 825-9971 or visit uclaextension.edu.

Tax Credit
You might be eligible for a tax credit for fees paid at UCLA Extension. For details, see the tax information in the general information section of the quarterly catalog, or visit uclaextension.edu.

Enrollment

Online
Visit uclaextension.edu for full information about our courses. Click on “Quick Enroll” and enter Reg#. Complete the online enrollment form for secure registration.

Phone
Call (310) 825-9971 Mon-Fri, 8am-5pm, using your American Express, Discover, JCB, MasterCard, or Visa card.

Questions / Further Information
Call Philip Williams at (310) 206-1689 or email pwilliams@uclaextension.edu. You may also visit our website at uclaextension.edu/pfp Cfpreview.

About our Programs

Recognized by employers throughout Los Angeles and beyond, UCLA Extension offers two CFP Board-registered certificate programs. These programs equip students with a thorough understanding of the entire financial planning process and provide relevant coursework for students who are planning to sit for the CFP® Certification Examination. To meet the busy schedules of working professionals, students have the option of completing their coursework in either live evening classes or instructor-led online courses.

Whether you’re considering a career change into financial planning or are already in the field and want to expand your prospects, UCLA Extension has the program options to meet your needs!

To learn more about our financial planning programs visit uclaextension.edu/pfp_programs.

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