Career Resources to Get You There

UCLA Extension certificate students have ongoing access to a number of career-related resources that can help move their finance career forward. Our programs work closely with employers, advisory boards, and professional associations to ensure students have the opportunity to network both in and outside the classroom. Career changers or those early in their finance careers also are encouraged to consider internships and seeking mentoring opportunities to help successfully transition into the profession.

Career Events
UCLA Extension participates in a number of annual career events when students can meet and network with industry veterans as well as representatives from professional associations and organizations. Career events are included to help students learn more about the finance profession.

CareerSpot
Special career services are available to our current Certificate Students and Certificate Graduates. This includes access to BruinView, UCLA’s job board, online resume critique service and virtual 1:1 career counseling.

Internships
The Internship in Finance provides students with practical experience in a variety of finance and investment job functions and provides the opportunity to apply the materials studied in the classroom. Certificate students must complete a minimum of 100 hours in their respective program prior to enrolling in the internship. Non-Certificate students may also enroll in the Internship based upon prior academic coursework completed.

Professional Associations
Students are encouraged to join and participate in relevant professional associations to help further expand their career development skills and engage in networking opportunities. UCLA Extension works closely with a number of organizations, including CAIA, Institute of Management Accountants (IMA), and Financial Planning Association (FPA) by promoting student membership and participation in chapter meetings and events. Members of these organizations also receive discounted fees to UCLA Extension finance and investment courses.

Contact UCLA Extension representative today for more information on the following:

Certificate
(310) 206-1654
bamcertificate@uclaextension.edu

Individual Courses
(310) 206-1689
pwilliams@uclaextension.edu

Corporate Training
(310) 206-7248
rburnes@uclaextension.edu

About UCLA Extension
UCLA Extension is the continuing education division of the University of California at Los Angeles. We offer graduate courses, undergraduate courses, individual courses, short courses, distance learning courses, and certificate programs in all fields, with a focus on professional career advancement and personal enrichment. Explore UCLA Extension at uclaextension.edu
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About UCLA Extension
UCLA Extension is the continuing education division of the University of California at Los Angeles (UCLA). We offer classes in evening and weekend formats at our Westwood and Downtown LA campuses, online classes available around the globe, and special programs and events in Los Angeles. Contact us today! UCLA Extension's Finance & Investment programs prepare you for a successful career in the world of finance.

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(310) 206-1654
bamcertificate@uclaextension.edu
This unit provides many services to students enrolled in certificates, including course selection and advisement, record maintenance, transcript evaluations, problem resolutions, and internships.

Individual Courses
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pwilliams@uclaextension.edu
For questions about course content, instructors, textbooks, location, and advance course scheduling.

Corporate Training
(310) 206-7248
rburnes@uclaextension.edu
Company discounts are available to employers sending 3 or more employees to any individual course. Learn more and schedule classes through our site and see how we can meet your organization’s specific training needs.

For details on our current special events, workshops, classes and advanced training, please visit uclaextension.edu/finance.
Today’s businesses and organizations are looking for financial professionals who can fill roles that complement their teams and, in particular, seek critical support. UCLA Extension’s comprehensive financial and investment curriculum is designed for real-world application, providing practical tools to help students meet the increasing demands of the finance profession while preparing individuals for industry certifications.

**Finance and Investment Programs**

**Career Path**

- Financial Treasurers
- farm managers
- financial managers
- financial trend analysis
- financial risk manager

**Qualities & Skills to Succeed**

- Having analytical skills and financial knowledge is only part of being successful in finance. Finance professionals must also:
  - Embody creative thinking and problem solving, with the ability to apply analytical skills to solve business challenges.
  - Demonstrate critical thinking and attention to detail.
  - Comprehend international finance and be familiar with global financial laws and regulations.

**Finance Certificate**

This finance certificate program provides a comprehensive curriculum covering key aspects of financial theory and practice. The Finance Certificate is designed to meet the needs of individuals who wish to enhance their financial knowledge.

**Curriculum**

- Electives (four required)

**Individual Courses**

- Corporate Finance
- New Business architect

**In Demand Certifications**

- Certified Management Accountant (CMA)
- Certified Treasury Professional (CTP)

**Financial Industry Certifications**

**Influential Benefits**

- Increased self-confidence
- Higher networking opportunities
- Increased respect among peers
- Improved career and income prospects
- Improved financial industry credentials and certifications

- **Financial Risk Manager (FRM):**
  - The Global Association of Risk Professionals (GARP) awards the FRM certification, which is recognized internationally.
  - Holders must demonstrate a deep understanding of financial risk management principles, including risk measurement, risk management decision-making, and risk communication.

- **Certified Management Accountant (CMA):**
  - The Institute of Management Accountants awards the CMA designation.
  - This credential is highly valued in the finance industry and is recognized worldwide.

- **Certified Treasury Professional (CTP):**
  - The Association for Financial Professionals International awards the CTP credential.
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Financial Professionals Are in High Demand

Effective financial decision making and proper management of financial resources can make or break a business or individual’s life plan. In an era of burgeoning investment opportunities, expanding globalization, and technological advancements, well-trained professionals with a strong grasp of financial operations and strategies will be the best candidates for career advancement.

The Finance Profession

Almost every business firm, government agency, or other type of organization is in need of experienced and knowledgeable financial managers. The role of the financial manager is changing rapidly, in the past, financial managers’ primary responsibility was to manage company finances. Today successful financial professionals combine data analysis and active senior management experience to help maximize profits, add value to financial managers, and work on cross-functional teams, acting as active business leaders or top executives.

Today’s successful professional financial managers are data analyzers and active senior managers who can help maximize profits, add value to financial managers, and work on cross-functional teams, acting as active business leaders or top executives.

Qualifications & Skills to Succeed

- Strong financial analytical and numerical skills
- Understanding of financial markets and investments
- Strong communication and interpersonal skills
- Excellent organizational, critical thinking, and problem-solving skills
- Knowledge of financial laws and regulations
- Expertise in specific financial fields, such as corporate finance, investment banking, financial advising, financial analysis & budgeting, real estate finance & investments

Career Path

- Most financial managers used a combination of education and experience
- Bachelor’s degree or higher in accounting, economics, or business administration
- Many candidates pursue their professional certification and attend a professional society
- Knowledgeable in fixed-income securities and valuations
- Strong analytical skills

Finance Certificate

This finance certificate program provides a comprehensive curriculum covering core aspects of financial theory and practice. The Finance Certificate is designed to meet the needs of individuals who wish to increase their knowledge in finance and business. This program offers a solid foundation for those who are interested in working in the financial industry or in other fields that need an understanding of finance.

- Electives: Financial Management, Investment Management, Advanced Corporate Finance

Self-Study Online Series

- Offered in collaboration with Global Wealth Partners, this sequential program consists of 10 sessions of online self-study modules. Many of the modules for those who wish to become Certified Financial Planner® (CFP®) professionals can be completed at any time during the program.

In Demand Certifications

- Chartered Financial Analyst (CFA®): The CFA designation is recognized worldwide, giving economists and investors a globally recognized standard by which to measure the competence and integrity of investment professionals. Employers recognize the CFA charter as the definitive standard by which to measure the competence, integrity, and dedication of serious investment professionals.
- Certified Management Accountant (CMA®): The CMA is specifically designed to measure the advanced accounting and financial management skills that support business performance. The CMA is tailored to measure the financial professionals at all levels, and will enhance your value and allow for adjusting career requirements.
- Certified Treasury Professional (CPT®): The CPT certification program is a benchmark of competency in the financial profession and is recognized as the leading credential for corporate treasury professionals. The Association for Financial Professionals (AFP) offers the CPT credential to those who pass a comprehensive exam that is based on treasury management concepts and who meet a two-year work experience requirement.

Financial Industry Credentials

Financial industry credentials and certificates provide improve career and income prospects, greater networking opportunities, increased respect among peers, and higher self-confidence. Today, more and more leading companies are encouraging employees to relevant industry certifications to ensure that their key staff members are highly skilled, motivated, and committed to their profession.

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The Finance Profession

In today’s business environment, government agencies, financial institutions, and other types of organizations are in need of experienced and well-trained financial managers. The role of the financial manager is changing rapidly, in part, because today’s financial managers’ primary responsibility often extends beyond financial management.

Today’s successful financial professionals are data analyzers and active smokers of ideas who help mainstream out innovations, find new revenue streams, act as catalysts in business development, and prepare their families for the job market.

Careers Path

Financial professionals can choose from a number of rewarding career paths, including:

- Corporate Finance
- Financial Analysis & Budgeting
- Investment Management & Analysis
- Financial Advisory
- Risk Management
- Treasury Management
- Real Estate Finance & Investments

Most financial managers receive a bachelor’s degree in finance, accounting, or business administration, and most have master’s degrees or professional certification. Continuing education and Professional Industry Credentials are also vital for financial managers who wish to advance their careers, given the growing complexity of financial and management strategies that will be the best candidates for career advancement.

Qualities & Skills to Succeed

- Having strong technical skills and financial knowledge is only part of being successful in finance. Financial professionals must also:
  - Exhibit creative thinking and problem solving, with the ability to apply analytical skills to solve business challenges.
  - Demonstrate critical thinking skills and attention to detail.
  - Understand the international financial system and the factors that influence global financial trends.
  - Know regulatory compliance practices and have high ethical standards.
  - Have excellent analytical skills and attention to detail, in addition to good communication skills.

Financial Certificate

This finance certificate program provides a comprehensive curriculum covering core aspects of financial theory and practice. The Finance Certificate is designed to help students gain the expertise and knowledge necessary to advance their career in finance and related fields. The Finance Certificate program provides a solid foundation for students considering the CFA and CFP certifications. All candidates completing the program are awarded a certificate that lists the goal of the University of California and is signed by the Dean of UCLA Extension.

Certificate

Students must successfully complete five core courses and electives for a total of 38 units. A core any-semester exam is required for each exam, with students having the option of taking the exam at any time during the program.

Required Core Courses

- 891.02 Basic Managerial Finance
- 510B Introduction to Investments
- 5123 Financial Statement Analysis
- 5126 Money and Banking
- 5133 Financial Risk Management

Elective Requirement

Elective (four required)

Students must successfully complete five core courses and electives for a total of 36 units. A one-day Business Ethics seminar must also be completed at any time during the program.

Individual Courses

Explore over 70 finance & investment courses taught by instructors who will share their expertise, experience, and research. There are courses open to all students, as well as individual courses that require specific knowledge in a particular area, fulfilling CE credits, or possibly satisfying prerequisites. To meet the busy schedules of working professionals, students can complete this degree in a classroom or via our instructor-led online format.

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Certified Treasury Professional (CPT®): The CPT® certification serves as a benchmark of competency in the finance profession and is recognized as the leading credential in corporate treasury worldwide. The Association for Financial Professionals (AFP) offers the CPT® credential to those who pass a computer-based exam that is based on treasury management concepts and who meet a two-year work experience requirement.

I gained tremendous analytical skills from the Finance Certificate Program. These skills have helped me in my position as an associate at an emerging hedge fund. Overall, I think the level of education offered in the Finance Certificate Program prepared me well for a successful career.
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Institute of Management Accountants (IMA)
(800) 638-4427 | www.imanet.org
Association for Financial Professionals (AFP)
(301) 907-2862 | www.afponline.org
California Bankers Association
(916) 438-4400 | www.calbankers.com
Global Association of Risk Professionals (GARP)
(201) 719-7210 | www.garp.org
Financial Industry Regulatory Authority (FINRA)
(800) 590-6500 | www.finra.org
Securities and Exchange Commission (SEC)
(800) 732-0330 | www.sec.gov
Securities Industry and Financial Markets Association
(212) 313-1000 | www.sifma.org
Investment Management Consultants Association
(303) 770-3377 | www.imca.org

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