To help assist our students in their career development efforts, UCLA Extension provides a valuable tool that links certificate courses.

**Get Started Today**

- **CFP Board-Registered Programs**
- **Personal Financial Planning**
- **Exam Review**

**Resources to Get You There**

Take an important step toward being the next generation of qualified financial planners!

Visit uclaextension.edu/pfp_programs for more information.

- **Learn More:**
  - CFP Board-Registered Programs
  - Personal Financial Planning
  - Exam Review

**Career Events**

UCLA Extension hosts a number of internal career events where students can network with industry partners or use special programs to advance their careers.

**CFP Board Career Center**

The CFP Board Career Center is a clearinghouse offering vital career, job search, and networking resources to students and professionals in financial planning. It’s also a dynamic platform for connecting with industry professionals through annual career events where students can meet and network with industry leaders.

**Professional Associations**

Students are encouraged to join and participate in relevant professional associations to help further expand their career development skills and experiences. UCLA Extension is the continuing education division of the University of California at Los Angeles (UCLA). We offer courses evenings and weekends in Westwood and Downtown LA, plus online classes available around the globe. Courses range from business, arts, engineering, and IT to entertainment studies, public policy, public health, the humanities, and more. Explore UCLA Extension today at uclaextension.edu/programs.

**UCLA Extension**

Registered Program, have met its ethics, experience and examination requirements. The CFP Board certifies a small number of programs to be CFP Board-Registered Programs.

**Corporate Training and Employer Discounts**

Contact a UCLA Extension representative or visit uclaextension.edu/pfp_programs for more information on the following:

- **Certificates**
- **Contact:**
  - rburnes@uclaextension.edu
  - (310) 206-7248

- **Individual Courses**

- **Certificates**

- **Contact:**
  - pwilliams@uclaextension.edu
  - (310) 206-1654

- **Industry Resource Guide**

- **Contact:**
  - (213) 384-0400

- **Company discounts are available to employers sending 3 or more employees to any individual course. Also, learn how our company training programs can be brought to your site and custom-tailored to meet your organization’s specific scheduling requirements**.

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Personal Financial Planning Certificates

UCLA Extension's nationally recognized certificate programs encompass the major disciplines of personal financial planning, and provide approved coursework for individuals who are preparing for the CFP® Certification Examination. The required curriculum can be completed within 15 months to 9 months.

Traditional Evening/Online

This 8-course certificate program is ideal for individuals who are considering a career transition into the financial planning field, or for current financial professionals who want to advance their career prospects. Students are provided a comprehensive curriculum taught by experienced financial professionals that is both current and relevant for industry trends and practical concerns. The required coursework includes four core subjects held during the evening over an 18-month period, and two online courses held during the summer. Residency credit for live classroom courses is offered for students taking the required coursework on an online basis.

The required curricula can be completed within 15 months to 9 months.

Introductory Courses

E 430.01 Survey of Personal Financial Planning
E 430.02 Financial Analysis in Personal Financial Planning
Core Courses

E 430.03 Income Tax in Personal Financial Planning
E 430.04 Investments in Personal Financial Planning
E 430.05 Retirement Plans and Other Employee Benefits
E 430.06 Estate Planning
E 430.515 Capstone Course
Accelerated Online Certificate

This 4-course online certificate program is designed for financial professionals with relevant work experience and clientele who are preparing for CFP® Certification. The required curriculum is comprised of instructor-led online courses that form the basis of the CFP® financial planning curriculum. Each course is scheduled over a 4-week period and includes both live and asynchronous sessions, fully preparing students to pass the CFP® Certification Examination. The required curriculum can be completed within 3 months.

E 431.01 Financial Planning Process and Practice
E 431.02 Financial Analysis in Personal Financial Planning
E 431.03 Income Tax Planning
E 431.04 Estate Planning

capstone Course

E 430.391 Certification, Training, and Ethics in Personal Financial Planning

Accredited by the CFP Board of Standards, UCLA Extension's nationally recognized certificate programs encompass the major disciplines of personal financial planning, and provide approved coursework for individuals who are preparing for the CFP® Certification Examination. The required curriculum can be completed within 15 months to 9 months.

UCLA Extension's Personal Financial Planning Certificate program as a Fellow: a student recommended it, and I was hooked! The program fully prepared me for the CFP exam — which I was able to pass on my first attempt.

I became interested in UCLA Extension’s Personal Financial Planning Certificate program as a fellow: a student recommended it, and I was hooked! The program fully prepared me for the CFP exam — which I was able to pass on my first attempt.

Whether working in a large firm or as an independent professional, you will enhance your marketability and career potential by preparing for CFP® Certification. This 8-course certificate program is ideal for those who are considering a career transition into the financial planning field, or for current financial professionals who want to advance their career prospects.

The required curriculum can be completed within 9 months or 12 months.

Professional Financial Planning Certification

UCLA Extension’s nationally recognized certificate programs encompass the major disciplines of personal financial planning, and provide approved coursework for individuals who are preparing for the CFP® Certification Examination. The required curriculum can be completed within 15 months to 9 months.

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The required curricula can be completed within 15 months to 9 months.

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Core Courses

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E 430.04 Investments in Personal Financial Planning
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Certificate, Training, and Experience Matter

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Personal Financial Planning Certificates

UCLA Extension’s nationally recognized certificate programs encompass the major disciplines of personal financial planning, and provide approved coursework for students who are preparing for the CFP® Certification Examination. For the second year in a row, UCLA Extension’s CFP® program was recognized as one of the 30 Great Schools for Financial Planning, by Financial Planning Magazine (Nov. ’14 issue).

Accredited Online Certificate
This intensive online certificate program is designed for financial professionals with extensive work experience and undergraduate or graduate degrees considering professional training to become fee-only financial advisors.

Traditional Evening/Online
This intensive certificate program is ideal for individuals who are considering a career transition into the financial planning field, or for current financial professionals who want to advance their career prospects. This program is comprised of a comprehensive curriculum taught by experienced financial professionals that is both current and relevant to industry trends and practices.

Path to CFP® Certification
By the year 2017,olders must pass the CFP® Certification Examination and meet all experience requirements to use the CFP® designation. The exam consists of 100 multiple-choice questions that are delivered via computer at an exam center associated with the College of Financial Planning.

Ethics
CFP® professionals must follow the CFP Board’s Code of Ethics and Professional Responsibility, as well as the CFP Board’s Standards of Practice and Conduct. They are also obliged to follow the standards of ethical conduct of their profession, as well as the laws, regulations, and rules of the states, provinces, or other jurisdictions in which they practice.

Experience
CFP® professionals must pass the CFP® Certification Examination and meet all experience requirements to use the CFP® designation. The exam consists of 100 multiple-choice questions that are delivered via computer at an exam center associated with the College of Financial Planning.

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It became interesting in UCLA Extension’s Personal Financial Planning Certificate program as a lawyer. A fellow student recommended it, and I was hooked. The program fully prepared me for the CFP exam—which I was able to pass on my first attempt.

According to the Bureau of Labor Statistics, employment for personal financial planners is projected to be among the fastest-growing occupations, with an expected growth rate of 27% through 2022. As the demand for qualified personal financial planners increases, so does competition for these well-paying jobs. Financial advisors who have extensive educational training, CFP® certification, and a full grasp of the financial planning process are expected to have the best opportunities.

The Financial Planning Professional
Whether working in a large firm or as an independent fiduciary, these professionals must be able to present a clear and concise picture of what clients want and need. Successful financial planners must be effective communicators while being approachable and honest. To give clients the best opportunity to make informed decisions, planners need to show proper training are among the most important as well.

Financial planners. Self-confidence and prepared me for the CFP exam—which I was able to pass on my first attempt.
A Career With a Bright Future

According to the Bureau of Labor Statistics, employment for personal financial planners is projected to be among the fastest-growing occupations, with an expected growth rate of 27% through 2022. As the demand for qualified personal financial planners increases, there are many opportunities for these well-paying jobs. Financial advisors who have extensive educational training, CFP® certification, and a full grasp of the financial planning process are expected to have the best opportunities.

The Financial Planning Professional

Whether working in large firms or as self-employed, good interpersonal skills, and project planning are among the qualities most valued among financial planners. Self-control and an independent work style are essential since the field can be unpredictable. \n
Certification, Training, and Experience Matter

According to a 2014 survey released by the CFP Board, more than 80% of respondents said having a CFP designation was an important factor in hiring financial professionals. The survey also revealed that consumers evaluate financial advisors by what they know, including the type of advice they provide. A financial advisor with a CFP designation is more likely to have years of hands-on experience, as well as a high level of education. Because the field can be sales-oriented, the ability to work independently are among the most important skills. Nearly 90% of respondents see an aptitude for working with numbers, and proper training are among the most important traits financial advisors must possess.

UCLA Extension Certificate Program Options

Whether you’re looking for a career change into financial planning, or an opportunity to advance your career prospects, UCLA Extension has the means to provide your professional training:

- **UCLA General 600**
- **CFP Board® Certification and Practical Experience Option**

UCLA Extension offers a variety of certificate programs and seminars. This survey tells us that firms need to rethink their training models to incorporate both theoretical and practical knowledge. The CFP designation is both current and relevant to industry trends and practices.

Traditionally, the CFP Certification Examination is taken on a “challenge” status. As a “challenge” candidate, you can submit a transcript review or previous education credits toward the State of California’s continuing professional education requirements. Course discounts are available to FPA and CalCPA members, as well as students through a rigorous process that encompasses both theoretical and practical knowledge. The CFP designation is both current and relevant to industry trends and practices.

Personal Financial Planning Certificates

UCLA Extension’s nationally recognized certificate programs encompass the major disciplines of personal financial planning, and provide approved coursework for students who are preparing for the CFP® Certification Examination. For the second year in a row, UCLA Extension’s PFP program was recognized as one of the 30 Great Schools for Financial Planning, by Financial Planning Magazine (Nov. ’14 issue).

Accelerated Online Certificate

This intensive online certificate program is designed for financial professionals with relevant work experience and confidence who are preparing for the CFP® Certification Examination. The 13-course curriculum is comprised of instructor-led online courses that blend live, Web-based sessions with instructor-led webinars, assignments, and reading.

Knowledge is acquired over a 4-week period and includes both the Level I and Level II curriculums for the CFP® Board Certification. The program includes an Exam Review Program and Certification. For more information on becoming a CFP®, visit CFPBoard.org.

Path to CFP® Certification

For more information on pursuing CFP® Certification, visit the CFP Board website at CFPBoard.org. The CFP® certification is highly regarded both by industry and consumers. Candidates are required to pass the CFP® Certification Examination. Candidates experience success in the CFP® certification program through a rigorous process that includes the completion of certain professional requirements (K. 4).
To help assist our students in their career development efforts, UCLA Extension provides important step toward being the next generation of qualified financial planners! Take an important step toward being the next generation of qualified financial planners! uclaextension.edu/pfp_programs

Learn more: Considering a career in financial planning.

Career Events

UCLA Extension hosts a number of career events where students can interact and network with industry veterans as well as representatives from professional associations and organizations.

CFP Board Career Center

The CFP Board Career Center is available to full-time certificate and associate’s degree students and alumni. UCLA Extension participates in the CFP Board Career Center, which provides ongoing access to a number of career-related resources. By working closely with employers, advisory boards, CFP Board, and professional associations, students are assured of networking opportunities both in and outside the classroom. UCLA Extension works closely with professional associations and organizations to help further expand students’ networking opportunities.

UCLA Extension does not certify individuals to use the CFP®, CFP® Marks. CFP® certification is granted only to individuals who successfully complete initial and ongoing certification requirements.

Personal Financial Planning

CFP Board-Registered Programs

• Traditional Evening/Online
• Accelerated Online
• CFP® Exam Review

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

Certificates

(310) 206-1654
extension@extension.ucla.edu

Corporate Training and Employer Discounts

(310) 206-7248
rburnes@uclaextension.edu

Individual Courses

(310) 206-1689
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Learn more:

Considering a career in financial planning.

Professional development, and industry clearinghouse offering vital career, selection of jobs and internships in graduates and students to a broad a valuable tool that links certificate programs.

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The Internship in Personal Financial Planning provides students with practical experience in a variety of financial planning job functions and the opportunity to apply the knowledge gained in the classroom. Students must complete a minimum of 300 hours in the certificate program before enrolling in the internship. Upon completion, students will be granted 3 units of credit toward the CFP Board’s work experience requirement.

Career Events

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