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Certified Financial Planner

Why the CFP®?

Certification Education Program

The CERTIFIED FINANCIAL PLANNER™ (CFP®) license is the marquee distinction in the financial planning industry. Consumers and businesses place a high value on a financial planner who has successfully obtained the CFP® designation because it not only reflects that the financial planner has exhibited mastery of nearly 100 integrated financial planning topics, but that she/he also met thorough and independently-established ethical, educational, and experience requirements. And because consumers and clients understand the value of the CFP® designation, CFP® financial planners are better able to market their services and bill accordingly.

In order to achieve the CFP® designation, a candidate will need the following:

- 1.) A bachelor's degree (or higher, or its equivalent) from an accredited university or college (degree may be in any field);
- 2.) 6,000+ hours of work experience within the financial planning industry;
- 3.) Pass a background check for ethics verification;
- 4.) Complete the CFP® education requirement coursework from a CFP® Board registered program (such as the one offered by NSU or you may try to receive challenge status);
- 5.) Pass the CFP® Certification Examination

For further information, prospective candidates are encouraged to visit the CERTIFIED FINANCIAL PLANNER™ Board of Standards, Inc.'s website at <http://www.cfp.net/>.

What NSU Can Do For YOU

Many professionals within the financial planning industry view the CFP® designation as the equivalent of a masters degree because not only has the CFP® designation holder successfully completed a challenging educational requirement, but she/he has also demonstrated how to apply the academic knowledge to real-world scenarios and events.

NSU is the only Board-Certified CFP® certification program in eastern Oklahoma. Through NSU's, you can begin your journey of distinction by meeting the pre-certification examination educational requirements in a manner that is convenient for you and your busy schedule. Instead of paying the enormous costs in time and in travel, food, and lodging, you can attend live classes at NSU's campus in Broken Arrow (or in Tahlequah through our ITV program).

In as little as 20 months, through NSU, you can fulfill the CFP® education requirement and be eligible to sit for the CFP® Certification Examination. And when you are ready for that challenge, NSU will also be there to help you with our Comprehensive Review Program.



Why NSU For Your CFP® Needs?

By choosing NSU as your CFP® educational sources, not only will you receive the benefit of convenience, you will also be instructed by the Accounting & Finance faculty of Oklahoma's flagship regional university. In addition to these professors, you will also receive instruction from various highly-esteemed financial professionals who have achieved the CFP® title, who can show you the ins-and-outs of the pitfalls of the CFP® Certification Examination and give real-world applications to the academic theories behind the CFP® Certification Examination's subject matter.

Costs for the CFP® Certificate Program

The CFP® Certificate Program consists of six (6) courses (that maybe taken in any order):

- 1.) Fundamental Principles of Financial Planning
- 2.) Insurance Planning & Risk Management
- 3.) Retirement Planning & Employee Benefits
- 4.) Investment Planning
- 5.) Income Tax Planning
- 6.) Estate, Gift, and Generation-Skipping Tax Planning

Each course runs for 12 weeks and meets 1 night a week for 3 hours. Each course is Pass/Fail and at the end of each course, students shall take a final examination to demonstrate mastery of the subject matter.

Each individual course costs \$700.00. In addition to this, each student is expected to provide her/his own textbook for the course. For the CFP® Certificate Program, NSU is exclusively using Keir Educational Resources CFP® textbooks. Students may order their textbook(s) from Keir at their web site (www.keirfinancial.com; click on the TEXTBOOK tab at the top). The costs of these textbooks from Keir are \$95.00 each; however, Keir has made its CFP® textbooks available to NSU students for \$85.00 each.

Keeping in mind that CFP® designation has the weight of a master's degree, the costs of time and finances weighed against the great benefits of CFP® distinction make NSU's CFP® Certificate Program a very affordable and viable option for you and your career.

Course Rotation Schedule: 2011 - 2013

Classes will meet each Tuesday evening at 6:00 pm and conclude at 9:00 pm. Beginning 2011, NSU's CFP® Certificate Program's course offerings will be:

February 1, 2011 - Fundamental Principles of Financial Planning

May 3, 2011 - Insurance Planning & Risk Management

August 2, 2011 - Retirement Planning & Employee Benefits

November 1, 2011 - Investment Planning (classes will NOT meet during the week of Thanksgiving [20-26], nor the week of Christmas [18-24], nor the week after Christmas [25-31], nor the week of New Year's Day 2012 [1-7]).

March 20, 2012 - Income Tax Planning

June 19, 2012 - Estate, Gift, and Generation-Skipping Tax Planning

September 18, 2012 - Fundamental Principles of Financial Planning (classes will NOT meet during the week of Thanksgiving [18-24]; this course will have its final lecture and examination on December 18, 2012).

January 8, 2013 - Insurance Planning & Risk Management

April 9, 2013 - Retirement Planning & Employee Benefits

July 9, 2013 - Investment Planning

October 8, 2013 - Income Tax Planning (classes will NOT meet during the week of Thanksgiving [24-30], nor the week of Christmas [22-28], nor the week after Christmas [Dec. 29

– Jan. 4]; classes will resume January 7, 2014).

January 28, 2014 - Estate, Gift, and Generation-Skipping Tax Planning

April 29, 2014 - Fundamental Principles of Financial Planning

July 29, 2014 - Insurance Planning & Risk Management

October 28, 2014 - Retirement Planning & Employee Benefits

(classes will NOT meet during the week of Thanksgiving [23-29], nor the week of Christmas [21-27], nor the week after Christmas [Dec. 28 – Jan. 3]; classes will resume January 6, 2015 and the course will conclude on February 3, 2015).

*NSU reserves the right to change this schedule and offer multiple courses per week should the change be warranted by the CFP® Certificate Program.

NSU's Comprehensive Review for the CFP® Certification Examination

Don't go into the CFP® Certification Examination alone! With our affordable and convenient CFP® Comprehensive Review, NSU can help you pass the exam and achieve the designation for which you've worked so hard.

NSU offers a complete comprehensive review of the CFP® Certification Examination subject matter every month before the actual examination. This way, the material will remain fresh in your mind, and you will have the opportunity to refine your skills and knowledge with the material from the review.

The comprehensive review will take place over 4 days and will generally begin on a Thursday. The cost to attend the 4 day review is \$625 per student. Students will need to purchase the review materials for the class from Keir (www.keirfinancial.com; \$375). It is recommended that students purchase these materials and review them a month before the comprehensive review takes place.

NSU's next comprehensive review will be:

February 10-13, 2011

The CFP® Certification Examination will be held in select cities on March 18-19, 2011.

Registration for Certificate Program and/or Review

All prospective students are to contact NSU's Continuing Education office at (918) 444-4610 for enrollment.

Program Director

The CFP® Certificate Program is a joint cooperative between the Accounting/Finance Dept. of NSU's College of Business & Technology and NSU's Continuing Education Dept. The program director is Dr. John Newhouse. Any questions or concerns involving the program may be directed to him, and he may be reached at (918) 449-6572 or via email at newhousj@nsuok.edu.

The Certified Financial Planner Board of Standards Inc. owns the marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP (with flame logo)®, which it awards to individuals who successfully complete initial and ongoing certification requirements." Northeastern State University does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP (with flame logo)® marks. CFP certification is granted solely by Certified Financial Planner Board of Standards Inc. to individuals who, in addition to completing an education requirement such as this CFP Board-Registered Program, have met ethics, experience and examination requirements.

