FLORIDA SOUTHWESTERN STATE COLLEGE
SCHOOL OF BUSINESS AND TECHNOLOGY

Center for Professional Development

CERTIFIED FINANCIAL PLANNER

Certification Education Program

This program is specifically designed for financial professionals and is structured to provide a comprehensive education in the practice of financial planning. The program is registered with the National CFP Board of Standards and provides the educational requirements for examination for the CERTIFIED FINANCIAL PLANNER™ certification.

The program curriculum is instructed by practicing financial professionals with the CFP® certification. The transfer of course credits from other registered programs are accepted

The program curriculum consists of six courses

<u>Courses:</u>

Principles of Financial Planning

Dates: (10 Weeks)

This course is designed to provide students with an understanding of the concepts of the financial planning process, the economic environment, the time value of money, the legal environment, financial analysis, and ethical and professional considerations in financial planning.

Insurance Planning

Dates: (10 Weeks)

This course is designed to provide students with an understanding of the concepts of identification of risk exposure, legal aspects of insurance, property and liability policy analysis, life insurance policy analysis, health insurance policy analysis, employee benefits, social insurance, insurance regulation, and principles of insurance taxation.

Investment Planning

Dates: (10 Weeks)

This course is designed to provide students with an understanding of the concepts of investment regulation, client assessment, investment theory, environment and financial markets, strategies and tactics, modern portfolio theory, and integration.

Income Tax Planning

Dates: (10 Weeks)

This course is designed to provide students with an understanding of the concepts of the fundamentals of income taxation, tax computations and concepts, tax planning, and hazards and penalties.

Retirement Planning and Employee Benefits

Dates: (10 Weeks)

This course is designed to provide students with an understanding of the concepts of the ethical considerations, social security and Medicare benefits, retirement plan types, qualified plan characteristics, distributions and distribution options, group insurance benefits, other employee benefits, and analysis of retirement factors.

Estate Planning

Dates: (10 Weeks)

This course is designed to provide students with an understanding of the concepts of the fundamentals of estate planning, estate planning considerations and constraints, tools and techniques for general estate planning, and the tools and techniques for special estate planning situations.

Cost: $695 per course – 6 courses in total (textbooks not included in price of course)

Location: Florida SouthWestern State College, Fort Myers campus, room to be announced

Instructor: Gregg Fortune, CFP, CFS, AEP

Advance registration and payment to Cont. Ed. is required

Seats are limited for group session, so register today!

For registration form and information, call 239-433-6963

Email: corporatetraining@fsw.edu

OR download from www.fsw.edu/ce

Requests for refund one week prior to the first class meeting will be granted. If you have a Higher One card through FSW the refund will be transferred to your Higher One Account. Due to the short-term nature of most Continuing Education programs, refunds will not be granted on or after the first class meeting.