

CERTIFIED FINANCIAL PLANNER™ (CFP®) PROGRAM

Offered by University of Georgia Executive Education, the Certified Financial Planner™ (CFP®) Certification Education Program equips aspiring financial planners with the skills and knowledge to excel in the dynamic personal financial planning field. Designed to meet the educational requirements of the Certified Financial Planner Board of Standards, Inc., the program prepares participants to pursue CFP® — a mark of excellence recognized across the financial planning profession.

PROGRAM FORMAT

Hybrid Model: Combines the flexibility of online learning with live, instructor-led sessions

Duration: Spans 12 months, allowing progression through courses at a manageable pace

Courses: Six comprehensive courses covering Fundamentals of Financial Planning, Insurance Planning, Investment Planning, Income Tax Planning, Retirement Planning, Estate Planning, and Financial Plan Development (Capstone)

WHO SHOULD ATTEND?

Ideal for professionals seeking to:

- Advance their careers in financial planning, wealth management, or related fields
- Enhance expertise in comprehensive financial planning
- Earn CFP® certification to gain a competitive edge in the industry

KEY BENEFITS

Expert Instruction: Learn from industry-leading faculty with extensive experience in financial planning.

Career Advancement: Gain the credentials to unlock new opportunities and establish yourself as a trusted advisor.

Comprehensive Curriculum: Develop a robust understanding of all aspects of financial planning to serve clients better and meet their financial goals.

Networking Opportunities: Engage with peers and professionals in the field, building connections that support career growth.

WHY CHOOSE UGA?

The Terry College of Business is renowned for its commitment to excellence in Executive Education. Participants benefit from:

- A rigorous, CFP Board-registered program
- Access to cutting-edge resources and a supportive learning environment
- The reputation of a nationally ranked business school
- Produces passing rates comparable with the nation's top business schools

NEXT STEPS

Ready to take the next step in your financial planning career? Visit our website to learn more about the program schedule, tuition, and application process. Join the ranks of successful CFP® professionals.

For more information, please contact: Jordan King
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terry.uga.edu/executive/certified-financial-planner



Terry College of Business
UNIVERSITY OF GEORGIA

EXECUTIVE EDUCATION

FREQUENTLY ASKED QUESTIONS

Why CFP® certification?

CFP® certification is a nationally and internationally recognized professional certification offered through the CFP Board. Certified Financial Planner Board of Standards Inc. awards the CFP® and CERTIFIED FINANCIAL PLANNER™ certification to individuals who fulfill initial and ongoing certification requirements.

84% of consumers who work with a CFP® professional say they're very satisfied. That's because CFP® professionals take a holistic, personalized approach to bring all aspects of financial life together and are committed to act as a fiduciary when providing advice to clients. Major institutions and firms are also seeking CFP® professionals with over 10,000 firms across the U.S. employing CFP® professionals. CFP® certification inspires confidence and satisfaction.

Why is CFP® Certification important?

Not all financial planners are “certified,” and anyone can call themselves a “financial planner.” But only those who went through the certification process by the CFP Board can display the CFP® certification marks. CFP® certification provides a great sense of security by allowing only those who meet the requirements the right to use the CFP® certification marks.

What is required to obtain CFP® certification?

You must meet the rigorous requirements referred to as the Four E's:

- [Education*](#)
- [Exam](#)
- [Experience](#)
- [Ethics](#)

**Bachelor's degree is not required to take our program*

Do you offer review courses?

We do not offer a review for the national comprehensive CFP® Certification Examination, but companies in Atlanta do:

- Zahn Associates' intensive review uses a special classroom book designed by Ken Zahn. Contact them directly at kenzahn.com
- The Dalton Review comprehensive CFP® review. For more information: thedaltonreview.com
- (Please note fees associated with these programs, and we do not endorse any particular program)

How much study time outside of class should I expect?

We recommend that for every hour spent in the classroom, prepare to spend 2–3 hours outside of the classroom studying.

Do you accept the HOPE Scholarship?

No, the HOPE Scholarship and other financial aid programs, such as the Pell Grant and Stafford Loan, are only available to students attending for-credit courses leading to a degree or other academic credentials. Certificate programs are not eligible for these scholarships.

Do you offer financial assistance for VA funding or military personnel?

We do not offer financial assistance for military personnel at this time.

Do I need to fill out the FAFSA (Free Application for Federal Student Aid)?

No, the FAFSA is only for degree programs.

Can I start a class while waiting for loan approval?

No, payment must be received before starting the program.

