

CERTIFIED FINANCIAL PLANNER™

Where serious financial services professionals set a new standard in excellence for their clients, their organizations, and themselves.

ARE YOU:

... a professional in the brokerage, insurance, accounting, banking, or related industry wanting to develop the skills and knowledge needed to become a financial advisor?

... a graduate of a four-year degree in finance or a related field?

... interested in taking the National CERTIFIED FINANCIAL PLANNER™ (CFP®) Certification Examination to demonstrate your commitment to the financial planning profession?

Then don't miss this cutting-edge learning experience!

The best way to serve your clients as a financial planner is to offer sound advice based on current financial fundamentals. A Certified Financial Planner™ designation signifies your dedication to your field and your commitment to offer clients sound guidance. There are four requirements to obtain certification: education, examination, experience, and ethics. The Terry College of Business is an established institution with the CFP® Board backing, which fulfills the educational requirements and prepares you for the demanding CFP® Certification Exam. Terry is registered with the CFP® Board of Standards, Inc., which administers the exam.

NEW PROGRAM STRUCTURE

Unlike other programs in Atlanta, UGA offers a blended course format which marries traditional classroom education with the convenience of an online experience. The 12-month program meets face-to-face one night a week every other week and is supplemented with online classes in between to cover all personal finance essentials. This robust format allows you to complete the educational requirements mandated to sit for your CFP® exam faster than any other program currently offered in the city.

With the knowledge that a complete online learning format is not the right fit for every learner, UGA's CFP® blended program features a highly engaging online component that

"It's a fantastic time to become a CERTIFIED FINANCIAL PLANNER™ because the need for it is significant. The curriculum the Terry program uses now is the best that's out there."

— Andy Harbor, Senior Vice President, Morgan Stanley
CFP®, CIMA®

compliments the instructor led courses. The controlled pace of the program allows for built-in accountability.

Courses cover:

- **Fundamentals of Financial Planning and Insurance**
- **Investment Planning**
- **Income Tax Planning**
- **Retirement Planning**
- **Estate Planning**

The course concludes with a Capstone/Case Study that helps students integrate their knowledge of all these financial planning subject areas and prepares them to take the CFP® exam. Developing a complete financial plan for a fictional client is a highlight of the Capstone, and preparing it benefits the students much the same way as student teaching benefits those in the educational field.

Completing the course is a major component of earning the CFP® certification and demonstrates that the student has met high professional standards and agrees to adhere to the principles of integrity, objectivity, competence, fairness, confidentiality, professionalism, and diligence when dealing with clients.

WHO SHOULD ATTEND?

- Financial planners looking to achieve their CFP® certification – the gold standard – so they can become more knowledgeable and provide a higher level of service.
- Professionals who are specialists in one particular area, such as selling insurance. They need to understand all the different facets of financial planning to broaden their horizons and understand how everything fits together.
- Individuals not currently working in the field, but who are changing careers into financial planning.

The Executive Program for Financial Planning Certification is geared towards working professionals because they can immediately apply what they learn to their jobs, enabling them to deliver better value to clients.

WHY TERRY COLLEGE OF BUSINESS?

The Terry College of Business Executive Programs adjunct faculty are more than classroom instructors; they have worked in the financial planning profession as business owners and practitioners, and are CFP® board-certified.

Because the instructors are working professionals, they understand the students' goals and aspirations. As a result, they can provide tips on how to prepare for the exam and explain the practical application of what the students are learning.

Program materials are regularly updated and students have online access to all course materials and lectures.

Professionals choose Terry over other programs because it combines flexibility, convenience, and quality with affordability.

CNNMoney ranked financial advisors #3 in their list of 20 fastest growing jobs with a median pay of \$93,000.

PAST PARTICIPANTS RAVE ABOUT THE CFP® PROGRAM

Recent graduate Greg B. Binney, CFP®, First Vice President and Client Advisor, SunTrust Bank, Private Wealth Management, credits the program with providing “the educational foundation needed to not only pass the CFP® Board exam, but to deliver sound comprehensive financial advice to my wealth management clients.”

Several of Binney's colleagues recommended the program to him based on their positive experiences. Now that he has completed it, he is recommending it to others.

“Overall, it was a well-organized program that quickly delivered a substantial amount of materials by instructors who had extensive subject matter knowledge and real-world experience,” he says. “The course materials and online training and testing were excellent and the program staff was courteous and helpful.”

REGISTRATION INFORMATION

The Certified Financial Planner™ program will be held at the Terry Executive Education Center at 3475 Lenox Road, Atlanta, GA 30326.

It's easy to register for the program. Just call 1-866-238-0756, e-mail us at expr@uga.edu, or visit us online at executive.terry.uga.edu/certified-financial-planner.