Certificate in Financial Planning

The Certificate in Financial Planning is a program tailored for professionals who already have an MBA or other graduate business-related professional degree or those with significant experience in the financial planning field. The program consists of the eight financial planning courses (three credits each.) Candidates in the Certificate program will also be instructed in all the 89 topics in financial planning, as prescribed by the Certified Financial Planner Board of Standards. Candidates who successfully complete this rigorous program will also be eligible to sit for the CFP® Exam.

Admission Requirements

This program is especially suitable for experienced professionals in the Financial Planning industry as well as those who have advanced degrees in business-related disciplines (e.g., MBA, MS in Finance, MAS, MS in Taxation, CPA, JD, etc.). While those with advanced degrees from regionally accredited U.S. universities will be automatically granted entry into the program, professionals from the field will be admitted only on a case-by-case basis after eligibility conditions have been met.

Certificate in Financial Planning Requirements

BUS 591	Financial Principles and Policies	3
BUS 501	Introduction to Financial Planning	3
BUS 593	Investment and Portfolio Management	3
BUS 502	Tax Management and Strategy	3
BUS 505	Employee Benefits and Retirement Planning	3
BUS 506	Risk Management and Insurance	3
BUS 507	Principles of Estate Planning	3
BUS 508	Capstone Course in Financial Planning	3
Total Hours		24

The MBA in Financial Planning program is also available online and consists of five 8-week terms. For more information, please visit www.callutheran.edu/cif.