Certified Financial Planning

Become an expert in the art of setting financial goals and identifying the tools needed to reach them.

Certified Financial Planners know the ins and outs of investing, saving, and money management. You'll guide clients through some of the biggest moments of their lives and be a resource for them when times are tough.

In online courses that last 8 weeks each, you'll learn from industry leaders about:

- Working with clients to set goals and assess risk tolerance
- Risk management and insurance planning
- Investing in the securities market, risk/return, stocks, bonds, options, futures
- Tax consequences and lawful tax-minimizing tactics
- Financial planning for retirement
- Tax and non-tax considerations in estate planning

$87k Median annual salary for Personal Financial Advisors

40% Job growth above national average for Personal Financial Advisors

31% Of Americans age 65 and up consult financial planners when planning for retirement

This program is designed so you're confident and ready when it's time for your CFP Board exams.

Contact us

Call Kate Teichman, Assistant Director of Admission, at **440.646.8360** or email her at **kathleen.teichman@ursuline.edu.**

2550 Lander Road, Pepper Pike, OH 44124 | **ursuline.edu/ucap**

Make Your World More

Ursuline College

Certified Financial Planning

Course Requirements

FP 301 - General Principles of Financial Planning
Learn about working with clients to set goals and assess risk tolerance.

FP 302 - Risk Management and Insurance Planning
Examine the general principles of risk management and insurance planning.

FP 303 - Investment Planning
Explore the securities market, risk/return, stocks, bonds, options, futures, and more.

FP 304 - Tax Planning
Learn to identify the likely tax consequences and lawful tax-minimizing tactics.

FP 305 - Retirement Savings and Income Planning
Learn to conduct retirement needs analyses for individuals

FP 306 - Estate Planning
Learn about tax and non-tax considerations in creating successful estate plans.

FP 307 - Capstone Course in Financial Planning
Participate in developing a complete financial plan, through the use of case studies and interviewing mock clients.

Great Minds

To create this Certified Financial Planning course, a consortium of colleges from across the country sourced material from some of the best minds in personal finance. Their expertise is built into your certificate.

- Dr. Ned Gandevani, a Harvard professor of Finance, practicing Portfolio Manager, and author of multiple successful finance books.
- Dr. Christopher Kubik, Professor of Accounting and Finance at Regis College, who holds a DBA from Anderson University and an MBA from University of Detroit.
- Dr. Helen Xu, a Professor of Finance at Holy Names University, who holds a PhD in Finance from University of North Texas.
- Dr. Erik Dellith, an Adjunct Instructor at College of Mount Saint Vincent, who holds a PhD in Economics from Fordham University.

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