

Become a
CERTIFIED FINANCIAL PLANNER™ Professional

CFP® Certification Education Program
August 2010 - January 2012



*Midlands
Technical
College*

Continuing Education

Midlands Technical College's CFP® Certification Education Program is registered with Certified Financial Planner Board of Standards Inc. (CFP Board).

CFP® CERTIFICATION EDUCATION PROGRAM

In today's competitive financial planning environment, the CFP® Certification is the mark of a true professional. Begin your personal quest for the certification that proves you are a leader in your profession. The CFP® Certification Education Program will help you expand your knowledge and credibility, broaden your contact network and deliver expertise to your clients.

Program Benefits

- **Up-to-Date Knowledge**

Our combination of experience, information and methodology will give you the knowledge you seek to more effectively serve your clients.

- **Expanded, New Career Options**

Your fellow students will create a valuable network of contacts. Participants in the CFP® Certification Education Program include accountants, bankers, stockbrokers, physicians, investment and insurance advisors, financial planners and attorneys.

- **Valuable Credentials**

Certification as a financial planner indicates an expertise as well as a commitment to delivering professional and comprehensive services that will impress and reassure your clients. Certification as a financial planner will provide you with the credibility that today's sophisticated clients demand.



About the Program

Classes for this session of the program begin August 3, 2010. The curriculum is seven courses over 18 months. Students will complete the program in January 2012 and be eligible to sit for the CFP® Certification Examination in March 2012.

About CFP® Certification

CFP® certification is a nationally and internationally recognized professional certification. Certified Financial Planner Board of Standards, Inc., awards the CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP (with flame logo)® marks to individuals who fulfill these initial and ongoing certification requirements: satisfy educational requirements, meet three to five years of work experience in a financial planning field, pass the CFP® Certification Examination, comply with CFP Board's Code of Ethics and Professional Responsibility, and meet continuing education and recertification requirements.

Obtaining CFP® Certification

A student enrolling in this 2010 CFP® Certification Education Program who passes the July 2012 comprehensive exam and meets CFP Board's other standards should be eligible to use the marks CFP® and CERTIFIED FINANCIAL PLANNER™ in 2012.

Tuition and Costs

Total tuition for enrollment in the program is \$3,500. The costs for the optional review course and associated texts, CFP® Certification Examination fee and CFP Board Certification fee are not included in the tuition. You should expect to pay \$500 – \$750 for the required text books, \$650 - \$1,000 for the optional review course, \$595 for the CFP® Certification Examination fee, and \$100 for the CFP Board Certification fee.

Entrance Requirements

As of 2007, the CFP Board requires that applicants hold a bachelor's degree from an accredited college or university. In addition, successful financial planning students who sit for the exam need three or more years of experience in the financial services industry. Applicants who do not meet these degree and work experience requirements are asked to interview with the program's director.

VA Approved

Call our VA Coordinator at (803) 738-7802 to begin the VA application process. To register or for information about payment plans available for this program, call (803) 732-0432. For other questions, call Patsy Towery, Director, Center for Special Programs and Community Education, at (803) 732-5256.

PROGRAM CURRICULUM

This CFP® Certification Education Program contains the career knowledge needed by financial planners, as determined by CFP Board. This program is offered over an 18-month period at Midlands Technical College Airport Campus and various other locations via interactive conferencing. Classes at all locations meet from 6 p.m. - 9 p.m. on Tuesdays.

Primary Program Location:

Midlands Technical College Airport Campus – West Columbia, SC

Interactive Conferencing Sites:

Aiken Technical College

Central Carolina Technical College

Florence-Darlington Technical College

Greenville Technical College

Horry-Georgetown Technical College

Piedmont Technical College

Technical College of the Lowcountry

Tri-County Technical College

Trident Technical College

York Technical College

The program consists of the following seven sequential courses, taught by practicing local professionals and CFP® certificants:

Fundamentals of Financial Planning*-CEFP-610

A foundation providing the student with a comprehensive overview of the financial planning process, emphasizing goal and priority setting, data gathering and implementing a financial plan. Also covered are time value of money concepts, financial calculator protocol, legal environment, financial analysis and ethical and professional considerations in financial planning.

August 3 - September 21, 2010.

Insurance Planning-CEFP-650

Various aspects of life, disability and medical insurance are covered in this course. Students also learn about property and casualty insurance (including homeowner's, liability and auto insurance), employee benefits, social security and insurance regulations. **October 5 - December 14, 2010.**

Investment Planning-CEFP-630

An analysis of investment alternatives in a risk-return framework, with an emphasis on selection, timing and diversification techniques is the focus of this course. Students learn how to construct and manage various investment vehicles appropriate for clients' needs. Proficiency on the financial calculator is required for this course. **January 4 - March 19, 2011.**

Retirement Planning and Employee

Benefits Planning-CEFP-640

Students learn how to effectively plan, implement and monitor personal and business-sponsored retirement plans.

March 29 - June 7, 2011.

Estate Planning*-CEFP-660

Students learn the techniques which minimize the impact of federal taxes on transfers of wealth, gifts and bequests, trusts, charitable transfers and intra-family business and property transfers. This course will stress the need for balancing tax and non-tax considerations in creating successful estate plans.

June 21 - August 30, 2011.

Income Tax Planning-CEFP-620

This module emphasizes the concepts and methods of determining tax liability for individuals and ways to efficiently manage a client's taxes. **September 13 - November 22, 2011.**

Comprehensive Examination Review-CEFP-680

This review emphasizes the various areas of personal financial planning and concepts in an integrated planning environment.

December 6 - December 13, 2011; January 3 - January 31, 2012.

** Both **Fundamentals of Financial Planning** and **Estate Planning** have each been approved by the South Carolina Department of Insurance to meet the requirement for three Ethics credits.*

Courses have been approved for both Life, Accident, and Health and Property and Casualty continuing education credits.

What our students say...

“After taking the Keir review course in Atlanta, I realized how much I do know and how well Neil has prepared us for the exam. I think those of us that took the MTC program have a leg up on the others. Many of the people in my review class did their education online and had huge gaps in knowledge. I felt well-rounded and overall prepared.”

Katie Stokes, CFP®
J.E. Wilson Advisors, LLC

“I have had the unique opportunity to experience two CFP® programs – one under Neil Brown at Midlands Technical College and one without Neil. MTC's program is excellent and not only prepares you for the exam, but more importantly, prepares you for real life situations as a practitioner. I wouldn't have my CFP® today if it wasn't for Neil Brown and MTC!”

Gina Lesslie, CFP®
SCANA

Neil A. Brown, CPA, CFP®, is the program coordinator and lead instructor for the CFP® Certification Education Program. He holds a master's of accountancy degree and is employed as a fee-only CFP® professional for Burkett Financial Services, LLC. He is also a national instructor for Keir Educational Resources' CFP® Certification Education Review; Surgent McCoy CPE, LLC and the American Institute of CPAs.

Program Coordinator and Lead Instructor Neil A. Brown, CPA, CFP®



CFP® Certification Education Program Application for Admission

Name _____ Date of Birth _____

Home Address _____

Home Phone _____ Cell Phone _____

Email Address(es) _____

Business Name _____ Business Phone _____

Business Address _____

Job Title _____

Insurance Agents must provide their 6 digit license number to receive Prometric CE credit: _____

Job Description _____

EDUCATION (list chronologically all post-secondary education)

<i>College/University</i>	<i>Dates Attended</i>	<i>Major/Field</i>	<i>Degree Diploma</i>	<i>Date Granted</i>

Signature _____ Date _____

Select the campus you wish to attend:

- | | |
|--|--|
| <input type="checkbox"/> Midlands Technical College
Airport Campus (Primary Site) | <input type="checkbox"/> Horry-Georgetown Technical College |
| <input type="checkbox"/> Aiken Technical College | <input type="checkbox"/> Piedmont Technical College |
| <input type="checkbox"/> Central Carolina Technical College | <input type="checkbox"/> Technical College of the Lowcountry |
| <input type="checkbox"/> Florence-Darlington Technical College | <input type="checkbox"/> Tri-County Technical College |
| <input type="checkbox"/> Greenville Technical College | <input type="checkbox"/> Trident Technical College |
| | <input type="checkbox"/> York Technical College |

Signature _____ Date _____

Mail completed application to: **Midlands Technical College
Continuing Education
P.O. Box 2408
Columbia, SC 29202**

**For more information,
visit mtctraining.com
or call (803) 732-0432.**

Midlands Technical College's CFP® Certification Education Program is registered with Certified Financial Planner Board of Standards Inc. (CFP Board). Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame logo), which it awards to individuals who successfully complete initial and ongoing certification requirements. Midlands Technical College does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame logo) certification marks. CFP certification is granted only by Certified Financial Planner Board of Standards Inc. to those persons who, in addition to completing an educational requirement such as this CFP Board-Registered Program, have met its ethics, experience and examination requirements.