

Become a
CERTIFIED FINANCIAL PLANNER™ Professional

CFP® Certification Education Program
2011-2013



Corporate and 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

Register online to join Midlands Technical College's new CFP® Certification Education Program offered in an accelerated format. This program requires a fast-access modem or DSL connection. It will take place via an interactive, web-based classroom accessible from an Internet connection anywhere in the world. The program will also utilize Midlands Technical College's *Desire2Learn* platform, which is an offline, asynchronous classroom environment further expanding on in-class activities that can be completed conveniently from your own computer. Call (803) 732-0432 to reserve your place with a \$500 non-refundable deposit toward the \$3,500 certificate fee; after December 31, tuition is \$3,850. Individual classes are \$695. Successful students will complete the program in July 2013. For additional information, call Neil Brown at (803) 386-7396; or to register, call (803) 732-0432.

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 CFP® Certification Education Program who passes the July 2013 comprehensive exam and meets CFP Board's other standards should be eligible to use the marks CFP® and CERTIFIED FINANCIAL PLANNER™ in late 2013.

Tuition and Costs

Total tuition for enrollment in the program is \$3,500; after December 31, it is \$3,850. 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.

Approved for VA Funding

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.

PROGRAM CURRICULUM

This CFP® Certification Education Program contains the career knowledge needed by financial planners, as determined by CFP Board. Classes meet online from 6 p.m. - 9 p.m. on Tuesdays.

This program will require a fast-access modem or DSL connection. The program will take place via an interactive, web-based classroom you can access from any Internet connection anywhere in the world. The program will also utilize Midlands Technical College's *Desire2Learn* platform, which is an offline, asynchronous classroom environment further expanding on in class activities that can be done at a time of your convenience from your own computer.

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.

December 27, 2011; March 6 - April 10, 2012.

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. **April 24 - June 19, 2012.**

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. **July 10 - September 4, 2012.**

Retirement Planning and Employee Benefits Planning-CEFP-640

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

September 18 - November 13, 2012.

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.

November 20, 2012 - December 11, 2012;

January 8 - February 5, 2013.

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. **February 19 - April 16, 2013.**

Comprehensive Examination Review-CEFP-680

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

April 30 - May 21, 2013.

** 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.... 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 - December 2011

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 six 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>
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Signature _____ Date _____

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

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

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