Executive Certificate in Financial Planning

Program Duration: 9 months

XLC's CFP Program provides the comprehensive knowledge needed to be successful in a financial career and continue on to be a Certified Financial Planner™.

XLC's Executive Certificate in Financial Planning program provides professionals with a valuable CFP® Board registered and approved program, and offers participants the contact hour minimum education requirements needed to sit for the CFP® Certification Exam.

This program will provide participants with a deepened knowledge of financial planning. After passing the CFP® Exam, participants will have earned industry recognized credentials and the ability to provide comprehensive financial plans to clients.

XLC partners with Dalton Education, who offers educational programs and materials to financial professionals to assist in their journey to become a CFP® professional.

Program Content

- Fundamentals of Financial Planning and Insurance (40 hours)
- Investment Planning (32 hours)
- Income Tax Planning (32 hours)
- Retirement Planning and Employee Benefits (32 hours)
- Estate Planning (32 hours)
- Capstone Course (32 hours)

Program Costs Include:

- Registration and facilitation costs
- Textbooks for each course
- Online access to pre-study lectures
- Online access to pre and post-course assessments
- Online quizzes, midterms, and finals

Cost

$5,500.00 General Registration

$4,950.00 Xavier Alumni, Military/Govt./Non-profit

20 CEUs will be issued for this program

Audience

Financial Planners, Insurance Agents, Employee Benefits Specialists, Investment Advisors and Brokers, Accountants, Bankers, Trust Officers, Anyone considering a career in financial planning.

Xavier Leadership Center is a registered education provider with the Certified Financial Planning Board of Standards Inc. Requirements to sit for the CFP® Exam include this coursework program and a bachelor's degree. For additional information on becoming a Certified Financial Planner™, please visit the CFP Board website.

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Course Descriptions

- **Fundamentals of Financial Planning and Insurance (40 hours)**
  An introduction to the financial planning profession, concepts to time value of money, insurance planning and the practice of personal financial planning by professional planners.
- **Investment Planning (32 hours)**
  An introduction investment planning process, risk and return, modern portfolio theory, equities, fixed income and derivative securities.
- **Income Tax Planning (32 hours)**
  An introduction to individual and various entity taxation issues.
- **Retirement Planning and Employee Benefits (32 hours)**
  An introduction to the retirement planning process, qualified and non-qualified retirement plans, social security and cafeteria plans.
- **Estate Planning (32 hours)**
  This course will provide students with an introduction to estate planning and taxation.
- **Capstone Course (32 Hours)**
  This course will require students to synthesize and apply elements of comprehensive financial planning, and to perform all functions of the financial planning process and apply the CFP Board's Practice Standards.

Payment Plan

Payments can be broken down into 6 installments of $916.66 and can be made by check or automatic credit card payments.

For questions email Ali Chadwell, chadwellam@xavier.edu or call 513-745-3396

Digital Badge

Xavier Leadership Center is proud to offer each participant a digital badge in Executive Certificate in Financial Planning once you have met program completion criteria. Digital badges include a direct link to view program credentials and can be utilized by participants on social media and digital resumes.

Certificate and CEUs

Upon successful completion of the program, participants will receive 20 CEUs and a certificate from Xavier University.

Executive Certificate in Financial Planning Program Schedule
January 2021 – September 2021

Fundamentals of Planning and Insurance (40 Hours)
January 21, 5:30 p.m. – 9:45 p.m.
January 28, 5:30 p.m. – 9:45 p.m.
January 30, 9:00 a.m. – 5:00 p.m.
February 4, 5:30 p.m. – 9:45 p.m.
February 11, 5:30 p.m. – 9:45 p.m.
February 18, 5:30 p.m. – 9:45 p.m.
February 20, 9:00 a.m. – 5:00 p.m.
February 25, 5:30 p.m. – 9:45 p.m.

Investment Planning (32 Hours)
March 4, 5:30 p.m. – 9:45 p.m.
March 11, 5:30 p.m. – 9:45 p.m
March 13, 9:00 a.m. – 5:00 p.m.
March 18, 5:30 p.m. – 9:45 p.m.
March 25, 5:30 p.m. – 9:45 p.m.
March 27, 9:00 a.m. – 5:00 p.m.

Income Tax Planning (32 Hours)
April 3, 9:00 a.m. – 5:00 p.m.
April 8, 5:30 p.m. – 9:45 p.m.
April 15, 5:30 p.m. – 9:45 p.m.
April 17, 9:00 a.m. – 5:00 p.m.
April 22, 5:30 p.m. – 9:45 p.m.
April 29, 5:30 p.m. – 9:45 p.m.

Retirement Planning and Employee Benefits (32 Hours)
May 13, 5:30 p.m. – 9:45 p.m.
May 20, 5:30 p.m. – 9:45 p.m.
May 27, 5:30 p.m. – 9:45 p.m.
May 29, 9:00 a.m. – 5:00 p.m.
June 3, 5:30 p.m. – 9:45 p.m.
June 12, 9:00 a.m. – 5:00 p.m.

Estate Planning (32 Hours)
June 17, 5:30 p.m. – 9:45 p.m.
July 1, 5:30 p.m. – 9:45 p.m.
July 8, 5:30 p.m. – 9:45 p.m.
July 10, 9:00 a.m. – 5:00 p.m.
July 15, 5:30 p.m. – 9:45 p.m.
July 24, 9:00 a.m. – 5:00 p.m.

Capstone Course (32 Hours)
August 5, 5:30 p.m. – 9:45 p.m.
August 26, 5:30 p.m. – 9:45 p.m.
August 28, 9:00 a.m. – 5:00 p.m.
September 2, 5:30 p.m. – 9:45 p.m.
September 11, 9:00 a.m. – 5:00 p.m.
September 16, 5:30 p.m. – 9:45 p.m.

Class Schedule is subject to change