Executive Certificate in Financial Planning with The Dalton Review

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.

This option includes The Dalton Review, upon completion, at a discounted rate of $995. (This price does not include The Dalton Review® Guarantee to Pass™ program. Dalton Education Enrollment Advisors will be available to provide assistance with an upgrade to The Dalton Review® Guarantee to Pass™ throughout your program.)

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

Audience

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

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)

Cost

$6,495.00 General Registration

$5,945.00 Xavier Alumni, Military/Govt./Non-profit

20 CEUs will be issued for this program

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.

Executive Certificate in Financial Planning

Program Duration: 9 months

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.
- **For details on The Dalton Review -** https://dalton-education.com/cfp-review-courses/dalton-review

Payment Plan

Payments can be broken down into 2 installments. The first half payment is due before the first meeting time and the second payment is due prior to the start of the capstone module.

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
September 2021 – May 2022

Fundamentals of Planning and Insurance (40 Hours)	
September 27, 5:30 PM – 9:45 PM	4
October 4, 5:30 PM – 9:45 PM	4
October 16, 9:00 AM - 5:00 PM	**8**
October 18, 5:30 PM – 9:45 PM	4
October 25, 5:30 PM – 9:45 PM	4
November 1, 5:30 PM – 9:45 PM	4
November 6, 9:00 AM - 5:00 PM	**8**
November 8, 5:30 PM – 9:45 PM	4
Investment Planning (32 Hours)	
November 15, 5:30 PM – 9:45 PM	4
November 20, 9:00 AM - 5:00 PM	**8**
November 29, 5:30 PM – 9:45 PM	4
December 6, 5:30 PM – 9:45 PM	4
December 11, 9:00 AM - 5:00 PM	**8**
December 13, 5:30 PM – 9:45 PM	4
Income Tax Planning (32 Hours)	
January 10, 5:30 PM – 9:45 PM	4
January 15, 9:00 AM - 5:00 PM	**8**
January 17, 5:30 PM – 9:45 PM	4
January 24, 5:30 PM – 9:45 PM	4
January 29 9:00 AM - 5:00 PM	**8**
January 31, 5:30 PM – 9:45 PM	4
Retirement Planning and Employee Benefits (32 Hours)	
February 7, 5:30 PM – 9:45 PM	4
February 12, 9:00 AM - 5:00 PM	**8**
February 21, 5:30 PM – 9:45 PM	4
February 28, 5:30 PM – 9:45 PM	4
March 5, 9:00 AM - 5:00 PM	**8**
March 7, 9:00 AM – 5:00 PM	4
Estate Planning (32 Hours)	
March 14, 5:30 PM – 9:45 PM	4
March 19, 9:00 AM - 5:00 PM	**8**
March 28, 5:30 PM – 9:45 PM	4
April 4, 5:30 PM – 9:45 PM	4
April 9, 9:00 AM - 5:00 PM	**8**
April 11, 5:30 PM – 9:45 PM	4
Capstone Course (32 Hours)	
April 23, 9:00 AM - 5:00 PM	**8**
April 25, 5:30 PM – 9:45 PM	4
May 2, 5:30 PM – 9:45 PM	4
May 9, 5:30 PM – 9:45 PM	4
May 16, 9:00 AM – 5:00 PM	4
May 21, 9:00 AM - 5:00 PM	**8**

**Please note that the Capstone Case Class is a total of 45 hours, which constitutes the hours of in class time plus hours for case projects including outside meetings with instructor and student teams.

Class Schedule is subject to change