

# EXECUTIVE CERTIFICATE IN FINANCIAL PLANNING WITH THE DALTON REVIEW

**XLC's Certificate in Financial Planning 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.

**This option includes The Dalton Review**, upon completion, at a discounted rate of \$1,095. (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.)



## **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

## **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)

**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: <https://www.cfp.net/>**

# EXECUTIVE CERTIFICATE IN FINANCIAL PLANNING WITH THE DALTON REVIEW

## Course Descriptions:

- **Fundamentals of Financial Planning and Insurance (40 hours)**
  - An introduction to the financial planning profession, time value of money, insurance planning, and the practice of personal financial planning by professional planners.
- **Investment Planning (32 hours)**
  - An introduction to the 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 while applying the CFP Board's Practice Standards.
- For details on The Dalton Review - <https://dalton-education.com/cfp-review-courses/dalton-review>

## Audience:

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

## Duration:

This program consists of 200 contact hours over the course of 9 months.

**Cost: \$6,795 General Registration**

**Select Discounts Available**

**20 CEUs will be issued for this program**



## Digital Badge:

Xavier Leadership Center is proud to offer each participant a digital badge in Executive Certificate in Financial Planning once participants 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.

## Payment Plan:

Payments can be broken down into 2, 4, or 6 installments and can be made by check or credit card. For questions and to set up a payment plan, email Layne Frederick, at [frederickl1@xavier.edu](mailto:frederickl1@xavier.edu), or call 513-745-1094.