EXECUTIVE CERTIFICATE IN FINANCIAL PLANNING

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 deepened knowledge of financial planning through 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. After passing the CFP® exam, students will become closer to earning industry-recognized credentials and the ability to provide comprehensive financial plans to clients.

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

Students will complete a midterm and final exam for each module except the Capstone, earning a 70% or higher. The Capstone includes an exam and an applied financial planning project.

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/

(513) 745-1094 | xlc@xavier.edu | www.xavierleadershipcenter.com

XAVIER LEADERSHIP CENTER

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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.

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 in-person contact hours over the course of 9 months.

Cost: $5,850 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 XLC at xlc@xavier.edu or call 513-745-1094.