School of Continuing Studies ONLINE

Professional Financial Planning

Open Enrollment Certificate Program

Gain the skills you need

The Professional Financial Planning Certificate provides participants with a global examination of financial planning principles and practices including insurance, investment, income tax, employee benefits, retirement and estate planning. The program is designed as a pre-professional program for those seeking to become Certified Financial Planners (CFP®).

Consumers may also be interested in curriculum as it provides a wealth of planning tools and resources, and helps individuals develop an appreciation for financial planning products and services. Financial general business students may want to pursue individual courses in order to augment their business education. Courses may be taken individually to develop an understanding of a specific.

Professional Financial Planning Certificate (21 credits)

350 Financial Planning Principles and Practice (3 credits) Learn how financial plans are developed. Topics include: establishing a client-planner relationship, gathering client data and determining client financial needs for investment, insurance, estate planning and retirement benefits. Understand the roles and responsibilities of the financial planner, including professional ethics.

351 Insurance Planning and Risk Management (3 credits) Develop life, health, casualty and liability insurance planning strategies as part of a comprehensive financial plan. Topics include assessing and managing risk, evaluating insurance products for tax and estate planning consequences, and understanding the role of insurance in retirement and businesses.

352 Investment Planning (3 credits) Survey various investment vehicles available to meet financial planning goals. Topics include evaluating risk tolerance, asset allocation strategies, security analysis, bond and security valuations, modern portfolio theory, market analysis, alternative investment instruments and special topics.

353 Income Tax Planning (3 credits) Develop an understanding of income tax planning opportunities, issues and challenges. Topics include income tax law, compliance, calculations, accounting, tax of business entities, trust and estate tax, tax basis, depreciation, like-kind exchange consequences, property tax, alternative minimum tax (AMT), tax reduction techniques, pass activity rules, special circumstances and deductions. Participants examine how insurance planning fits into a comprehensive financial planning strategy.

354 Employee Benefits and Retirement Planning (3 credits) Learn how employee benefit plans and a comprehensive retirement planning help clients meet their financial goals. Topics include retirement needs analysis, Social Security, types of retirement plans, qualified plan rules, investment considerations, distribution rules and consequences, employee benefit plans and options.

355 Estate Planning (3 credits) Survey estate planning principles as they relate to the development of a comprehensive financial plan. Topics include property titles and transfers, documents including wills and trusts, gifting strategies, tax consequences and compliance, liquidating estates, charitable giving, life insurance, business transfers, fiduciaries and special topics.

356 Financial Plan Development (3 credits) Develop professional financial planning strategies, approaches and techniques. Upon completing the course, each participant will have developed and presented a comprehensive financial plan based on various client concerns, life stages and risk tolerances.

Tuition

$425* per unit

$8,925* for certificate

Early Bird discount available

*pricing subject to change

Convenient

- No formal application or admission requirement
- One night a week
- Online available

Schedule & Registration

redlands.edu/continuingstudies

Average Completion Time

14 months

Information

info-scs@redlands.edu
909-748-8868

We offer

- Relevant coursework
- Degree-applicable credit

About University of Redlands

The University of Redlands is a private, nonprofit university that connects students to a world of opportunity, geared toward their passions and potential. Centrally located near the beaches, mountains and desert in the heart of Southern California, the University offers more than 40 undergraduate programs, as well as 30 graduate programs in business, communication sciences and disorders, education, geographic information systems and music—blending liberal arts and professional programs, applied and theoretical study, traditional majors and self-designed curricula. In addition to an award-winning 160-acre campus in Redlands, the University includes seven regional locations, providing innovative programs at convenient places and times for working adults.

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