



Certificate Program in Financial Planning

Western Carolina University's Financial Planner Certificate Program is registered with Certified Financial Planner Board of Standards Inc. (CFP Board). As a CFP Board-Registered Program, our courses satisfy CFP Board's education requirement, allowing an individual to sit for the CFP® Certification Examination.

Courses will meet online with 3 required face-to-face meetings per class. The complete certificate program consists of five courses: The first two courses as shown below are registered for at the same time. The remaining 3 can be taken separately. The online class will start one week prior to the first scheduled meeting.

Select the course(s) you are currently registering for:

Courses 1 & 2 are required to be registered for at the same time

- 1. **Intro to Financial Planning & Risk Management** 1/18 – 2/29 Meets 1/18, 2/1, 2/15, & 2/29
- 2. **Investment Planning** 3/14 – 4/25 Meets: 3/14, 3/28, 4/11, 4/25
- 3. **Income Tax Planning** 5/9 – 6/20 Meets: 5/9, 5/23, 6/6, 6/20
- 4. **Retirement Planning** 7/11 – 8/22 Meets: 7/11, 7/25, 8/8, 8/22
- 5. **Estate Planning** 9/5 – 10/17 Meets: 9/5, 9/19, 10/3, 10/17
- 6. **Capstone Case Writing** 10/31- 12/12 Meets 10/31, 11/14, 11/28, 12/12

Students will be expected to spend at least 25 hours per course online.

Program Director Grace C. Allen, Ph.D is an associate professor of finance at Western Carolina University. She is the director of the financial planning degree and certificate programs at Western. In addition to being the director of the program, she teaches extensively in the financial planning program. At Western Carolina she has received the Board of Governors Excellence in Teaching Award, Chancellor's Distinguished Teaching Award, twice received the Jay I. Kneedler Teaching Award and three times received an Innovative and Creative Teaching Award. She is currently involved in research in the areas of financial planning and international business.

First Name: _____ MI _____ Last Name _____
 Organization (optional): _____
 Address: _____
 City _____ State _____ Zip _____
 Phone: _____ Email _____

I am registering for: \$1,250 First Two Courses together \$650 Other Course

Method Check payable to WCU Credit Card

Cardholders Name: _____

Card Number: _____ Expiration Date: _____

Western Carolina University does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™ and CFP marks. CFP certification is granted solely by Certified Financial Planner Board of Standards Inc. to individuals who, in addition to completing an educational requirement such as this CFP Board-Registered Program, have met ethics, experience and examination requirements.

To Register Online

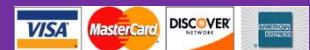
<http://learn.wcu.edu>
Click on Professional Development

Or mail this form to:
WCU Continuing Ed
138 Camp Building
Cullowhee, NC 28723

2012

All face-to-face meetings will take place in Asheville

Courses are \$650.00 each.
Students are required to register for the first two courses together for \$1,250.00.



Pre-registration is required for all courses. Cancellation refunds, minus \$150 are available only until 10 days prior to the class start date. Requests must be received in writing. All classes, workshops and seminars are subject to minimum enrollments. WCU reserves the right to cancel this offering at any time. In such cases, full refunds will be granted to all participants. Additional registration forms are available at <http://learn.wcu.edu>. For questions, please contact Continuing Education at 828-227-7397 or email: hensley@wcu.edu