



Certified Financial Planner[®] Certificate Program

Two Ways to Register

[1. Click here to register online with a Visa or Mastercard](#)

OR 2. Download this form and mail with payment to the address shown at bottom

Western Carolina University's Financial Planner Certificate Program is registered with the Certified Financial Planner Board of Standards, Inc. Students who successfully complete all 5 courses will meet all the necessary educational requirements to sit for the CFP® Certification Examination.

The complete 5-course program can be completed in only nine months. This unique program is offered online with optional face-to-face workshops on the UNCA campus. Students will enjoy the benefits and convenience of online instruction plus have the opportunity to interact and work with an exceptional faculty member to improve skills on more difficult concepts or problems in a face-to-face learning environment. The course is taught by WCU faculty who also teach in the highly successful financial planning degree program at WCU. Note that the first two courses are taught together and begin on March 12, with the first class meeting scheduled for March 26. All face-to-face meetings will take place at the Owen Conference Center at UNC-Asheville from 4pm to 7pm.

Please check the course for which you are currently registering:

Course	Cost	Title	Online Start / End	Optional meetings
<input type="checkbox"/> Course 1&2	\$1250	Investment Planning and Intro to Financial Planning & Risk Mgt.	March 12-April 23 May7 – June 11	3/26, 4/2 & 4/9 5/7, 5/21, & 6/4
<input type="checkbox"/> Course 3	\$650	Retirement Planning	June 25-Aug. 6	6/25, 7/16, 7/30
<input type="checkbox"/> Course 4	\$650	Income Tax Planning	Aug. 27 – Oct. 1	8/27, 9/10 & 9/24
<input type="checkbox"/> Course 5	\$650	Estate Planning	Oct. 22 – Dec.3	10/22, 11/5, & 11/19

All 5 courses \$3,200.00

File Management Workshop – Registration

First Name: _____ MI _____ Last Name: _____
 Organization (optional) : _____
 Mailing address: _____
 City _____ State _____ Zip _____
 Phone: _____ Alternate Phone: _____
 Email: _____

Method: Check enclosed payable to *WCU* Visa or Mastercard Purchase Order # _____
 Check here if invoice is required



Name on Card: _____
 Card number _____
 Expiration Date _____
 Signature: _____

Pre-registration is required. Cancellation refunds, minus a \$10 processing fee are available only 3 days prior to the event and must be received in writing. Additional registration forms are available at <http://learn.wcu.edu>. For questions, please contact Dr. Susan Fouts at 828-227-7397 or email: sfouts@email.wcu.edu.

Return this registration with payment information to: WCU Educational Outreach, 138 Cordelia Camp Building, Cullowhee, NC 28723 – Or FAX (no cover needed) to 828-227-7115