
Tallahassee Community College

# CFP® Certification Professional Education Program

## Tallahassee Community College

The **CFP® Certification Professional Education Program** is a CFP Board-Registered Program. Individuals who successfully complete our program will fulfill the CFP Board contact hour minimum education requirement and become eligible to sit for the CFP® Certification Exam.

This program meets the needs of professionals who plan, assess, and evaluate a client's financial future through the development of a comprehensive financial plan and are are taught by financial service professionals employed in the field.

### OUR COURSES

- General Principles
- Insurance Planning
- Investment Planning
- Income Tax Planning
- Retirement Planning
- Estate Planning
- Capstone

### PROGRAM TUITION INCLUDES:

- **Classroom Materials:** National Underwriter text-books and Zahn Workbooks
- **In class** quizzes, case studies, and final exams
- **Live Instruction classes** capped at 20 students
- **Network** with professionals to build professional relationships

### WHO SHOULD ATTEND:

- Financial Planners
- Insurance Agents
- Retirement Plan and Employee Benefits Specialists
- Investment Advisors and Brokers
- Accountants
- Bankers
- Trust Officers
- Anyone considering a career in financial planning

Call **(850) 201-6200** or visit
www.tcc.fl.edu/workforce-development

## Tallahassee Community College

### Workforce Development

444 Appleyard Drive
Tallahassee, FL 32304
850-201-6240

# CFP® Certification Professional Education Program

## GENERAL PRINCIPLES | 38 HRS

Comprehensive overview of financial planning fundamentals. The course focuses on the general principles required to become a successful financial planner which include the ethics of the profession as well as the knowledge and skills required to prepare a financial plan.

## INSURANCE PLANNING | 38 HRS

Designed to acquaint students with the principles of risk management and various types of insurance including casualty, fire, health, life, auto, home, disability. The principles taught prepare students to identify a client's risk exposure and select appropriate risk management techniques.

## INVESTMENT PLANNING | 38 HRS

Develops skills to effectively evaluate various investment vehicles in accordance with client investment objectives. Topics include: regulation of markets, investment vehicles, investment theory, real estate investment, international investment, analysis of risk and return, financial markets, and modern portfolio theory. Prepares students to work with clients to structure an investment portfolio reflecting the client's life circumstances and objectives.

## INCOME TAX PLANNING | 38 HRS

Provides a comprehensive coverage of federal income taxation and supplies participants with information and techniques critical for effective tax planning. Topics include: ethical issues, tax law research, terminology, tax computations and concepts, hazards, and penalties. Introduces methods of gathering client information, reviewing clients' past returns, and minimizing tax payments legally. Covers tax management techniques, tax implications of divorce, employee benefits and investment, financial planning strategies, business structures, sale of personal residence, and passive activity loss rules.

## RETIREMENT PLANNING | 38 HRS

Provides a comprehensive study of personal and employer-sponsored retirement plans and familiarizes students with methods of gathering information and selecting appropriate options to achieve client retirement goals. Topics include: ethical issues in retirement planning and employee benefits, IRAs, the role of Social Security and Medicare Benefits, tax-sheltered annuities, qualified retirement plans, distributions and distribution options, taxation of benefits, group insurance, and factor analysis.

## ESTATE PLANNING | 38 HRS

Provides an overview of estate planning and knowledge of the various methods, tools and techniques necessary to develop effective estate plans. Topics include: federal and estate gift taxation, gift and estate planning techniques, trusts, life insurance as an estate planning tool, intra-family business and property transfers, charitable transfers, planning for incapacity, and divorce planning. Also covers wills, trusts, powers of attorney and probate.

## CAPSTONE | 45 HRS

Thorough, timely review and application of all material covered in the six core courses through complex, broadly based case studies and practical application of critical knowledge, skills and concepts to develop sound financial plans and advice in preparation for the CFP® Certification Examination. Prepares students to analyze complex situations, practice application at the evaluation level of cognitive ability, update their knowledge regarding new legislation or regulations affecting the financial planning field, and develop sound plans in response to realistic situations.

### AUDIT STUDENTS

To audit a course from CFP® Certification Professional Education Program, you must provide proof of prior course work from another provider by sending transcripts to Continuing Education. Upon completion of an audited course, will not award a grade or certificate for audited courses. The purpose of auditing a course is to obtain knowledge to better prepare in a specific area. Please contact CE to review your situation and tuition fee for pending courses.

### CHALLENGE STATUS AND TRANSCRIPT REVIEW

**Challenge Status**
*To challenge the educational requirement, candidates must hold a specific academic degree or professional credential accepted by the CFP Board and complete the Capstone course through the education program.*

**Transcript Review**
*Certain industry credentials recognized by CFP Board, or the successful completion of upper-division level college courses, may satisfy some or all of the education requirement set by CFP Board.*

### INSURANCE CONTINUING EDUCATION (Varies by partnership)

*The six core courses are approved by the State's Department of Financial Services to provide Insurance CEUs to any student with a valid State's Insurance License. The student must complete all contact hours in a course in order to be eligible to receive CEUs.*

*To obtain CFP Board's Guide to CFP® Certification or request information, call toll free 800-487-1497 or mail@cfpboard.org.*

*Website : www.cfp.net/become*



ZAHN

*In partnership with Zahn Associates Inc., we offer quality education materials to financial professionals to assist in their journey to become a CFP® professional*