

Certificate

# Personal Financial Planning

Fully prepare for CFP® Certification while also learning relevant trends and practices in the financial planning field.

**Total Units:** 32

The Personal Financial Planning program consists of 8 required courses and a 1-day Ethics in Personal Financial Planning seminar. Students must take all courses for letter grade and pass with a program GPA of 2.50 or better. Students are also encouraged to take the 4-week exam prep course before sitting for the Certified Financial Planner (CFP) Certification Exam.

**Completion time:** 1 year (full-time) or 1 to 2-years (part-time)

**Eligible for:**

International Students  
VA Benefits

## Introductory

8 Units | 2 Courses

Typically Offered\*

COURSE NAME & NUMBER	UNITS	FALL	WINTER	SPRING	SUMMER
<a href="#">Survey of Personal Financial Planning</a> MGMT X 430.31	4.0	Classroom Online	Classroom Online	Classroom Online	Classroom Online
<a href="#">Financial Analysis in Personal Financial Planning</a> MGMT X 430.391	4.0	Classroom	Classroom	Online	Online

*Courses may be taken concurrently.*

## Required

20 Units | 5 Courses, 1 Seminar

Typically Offered\*

COURSE NAME & NUMBER	UNITS	FALL	WINTER	SPRING	SUMMER
<a href="#">Investments in Personal Financial Planning</a> MGMT X 430.32	4.0	Online	Online	Classroom	Classroom
<a href="#">Insurance in Personal Financial Planning</a> MGMT X 430.35	4.0	Classroom	Online	Classroom	Online
<a href="#">Income Taxation in Personal Financial Planning</a> MGMT X 430.33	4.0	Classroom	Classroom	Online	Online
<a href="#">Retirement Plans and Other Employee Benefits</a> MGMT X 427.904	4.0	Classroom	Classroom	Online	Online
<a href="#">Estate Planning</a> MGMT X 439.3	4.0	Classroom Online	Classroom Online	Classroom Online	Classroom
<a href="#">Ethics in Personal Financial Planning</a> MGMT 833.379	---	Classroom	Online	Classroom	Online

## Capstone

4 Units | 1 Course

Typically Offered\*

COURSE NAME & NUMBER	UNITS	FALL	WINTER	SPRING	SUMMER
<a href="#">Personal Financial Planning Capstone</a> MGMT X 430.38	4.0	Classroom	Online	Classroom	Online

*Prerequisite: Successful completion of all other seven courses in the certificate.*

## Exam Prep

This course is not part of the certificate, but is recommended for those taking the exam

Typically Offered\*

COURSE NAME & NUMBER	UNITS	FALL	WINTER	SPRING	SUMMER
<a href="#">Review Course for the CFP Certification Exam</a> MGMT X 833.374	---	Classroom Online	Classroom Online	Classroom Online	Classroom Online

**Please Note:**

An application form and nonrefundable fee are required to establish candidacy in this program. The application & candidacy fee establishes your candidacy in the program for a period of time covering normal progress toward completion, and may allow you to access a variety of program benefits. Payment of the candidacy fee is also required in order to have your transcripts transferred to the CFP Board in order to sit for the exam. [Apply Now](#)

\*Courses in this program are typically offered during the quarters and format(s) outlined above. Scheduling is subject to change at any time by UCLA Extension.

Please visit our website for all current course offerings.

**Contact Us**

310-206-7247

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