



COLLEGE OF BUSINESS / CENTER FOR PROFESSIONAL EXCELLENCE

UTSA's Center for Professional Excellence (CPE) is pleased to offer its CFP® Certification Education Program! The program is designed with the needs of working professionals in mind, and satisfies the educational requirement to sit for the CFP® Certification Examination.

The program provides a disciplined approach to the required material through weekly face-to-face contact with highly-credentialed instructors who explain difficult subject matter and offer practical application of the materials. Students also have the opportunity to interact with other financial planning professionals through weekly study sessions which reinforce the classroom instruction.

UTSA's program is presented through seven courses:

Foundamentals of Financial Planning – basic principles and process of financial planning, plus intense, practical instruction in the use of a financial calculator

Insurance – basic elements of risk management and insurance, including life, health, disability, and property & liability.

Investments – exposure to a wide variety of investment vehicles, as well as tax considerations, valuation methods, allocation strategies, and portfolio performance evaluation.

Income Tax Planning – effective strategies for managing clients' tax liabilities.

Retirement & Employee Benefits – retirement savings & needs analysis; retirement plan designs; Social Security; and Medicare.

Estate Planning – federal estate & gift taxation; wills; probate; trusts; and development of comprehensive estate plans.

Certification: Synthesis & Integration (CSI) – a “capstone” course that provides practical application experience of ALL subject matter and prepares students to take the certification examination.

Classes are held on week-day evenings from 6:00 – 9:00 in the CPE facility on UTSA's 1604 campus. All textbooks & materials are provided as part of program costs.

For more information, please contact:

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or visit our website www.cpe.utsa.edu & click on “Executive Education”