

CERTIFICATE PROGRAM *in* FINANCIAL PLANNING

The SMU Certificate Program in Financial Planning (CPFP) can help your advisors add the coveted CFP® marks to their credentials.

As the premier CFP Board-registered provider in Dallas, SMU focuses on the needs of our students by offering small class sizes and experienced professionals who specialize in the curricula they teach.

SMU has developed a corporate partnership program that provides significant tuition discounts for employers who are committed to excellence.

Benefits offered by the SMU Program:

- 10% savings for corporate partners
- Affordable, competitive advantage for your financial consultants
- Comprehensive, thorough curriculum
- Impressive CFP® Exam pass rate
- Superior quality of instruction
- Convenient, pay-as-you-go plan to coordinate with employee tuition reimbursement programs
- SMU Certificate in Financial Planning awarded upon completion

The SMU Pacesetter Path:

Complete the SMU Program in as little as one academic year by taking two courses per quarter.

To learn more about how the SMU Program can help your advisors reach their full potential, please contact our Program Director, Clark Randall, CFP®, at 972-361-3865 or e-mail us at cpfp@smu.edu.

For additional information about the SMU Certificate Program in Financial Planning, please visit smu.edu/cfp.

The SMU Certificate Program in Financial Planning 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. The SMU Program Director is a CERTIFIED FINANCIAL PLANNER™ practitioner, and our instructors provide you with the most current information in financial planning.

Individuals can attain CFP® certification after fulfilling the education requirement, passing the comprehensive CFP® Certification Examination, demonstrating work experience and completing the ethics requirements. A CERTIFIED FINANCIAL PLANNER professional has attained financial planning's most prominent certification.

SMU does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame logo) certification marks. CFP certification is granted only by Certified Financial Planner Board of Standards Inc. to those persons who, in addition to completing an educational requirement such as this CFP Board-registered program, have met its ethics, experience and examination requirements. Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame logo), which it awards to individuals who successfully complete initial and ongoing certification requirements.

