

## Personal Financial Planning Accelerated Program – Winter 2012 (Reg# 00459)

This in-depth program provides a client-centered, problem-solving methodology that includes case studies, giving you a hands-on approach to the material.

Held in Irvine on UC Irvine campus, each subject will consist of three classroom meetings held on Friday through Sunday from 8:00am-6:00pm plus one live online WebEx meeting held on the following Monday from 5:30-9:30pm. The program dates begin March 9, 2012 and end August 12, 2012.

**The Accelerated Program fee is \$4,200 \*\*.** A short online orientation can be viewed on our website. The orientation will discuss the program details. Please go to <http://unex.uci.edu/services/events/recorded.asp> to view the recording (note the orientation recording has an outdated location). Below are the subjects and dates:

CFP 1 - The Financial Planning Process and Insurance: March 9 – 12, 2012

CFP 2 - Investment Principles: April 13 – 16, 2012

CFP 3 - Income Tax Planning: June 1 – 4, 2012

CFP 4 - Employee Benefits and Retirement Planning: July 13 – 16, 2012

CFP 5 - Estate Planning: August 10 – 13, 2012

To be eligible for the CFP Examination, students are also required to take the Personal Financial Planning Practicum course. Practicum course fee: \$550 (classroom format), \$610 (online format). Currently, classroom format is only offered in the summer quarter. Online format is offered in all other quarters.

*Note: A series 7 license is highly recommended.*

**\*\* Program fee does not include required textbooks and parking. This program requires 6 textbooks.**

**Textbooks are \$86 each (not including tax and shipping/handling). Textbooks list and instructions on how to place your orders will be noted on your enrollment confirmation.**

The daily rate for daytime parking is \$10 per day. You can purchase daily permit from the parking attendant at the Social Sciences Parking Structure (SSPS on campus maps). There is no attendant on Sundays, but there is a permit dispenser located next to the attendant booth.

**Enrollment deadline is February 20, 2012. Enrollments after this date must be approved by the instructors or UCI Extension.**

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We do offer a payment plan for the Accelerated Program:

\$1,500 at time of enrollment

\$1,350 due April 30, 2012

\$1,350 due May 31, 2012

To enroll using the payment plan option, you must either register by phone (949/824-5414, press 1), in person or by fax using the enclosed enrollment form. By phone or in person, ask for Marlita Harris or Jeni Park. If they are not available, one of the other representatives can assist you. **Please note if payments are not submitted prior to the due dates listed above, you will not be allowed to continue.**

**Practicum Course: Payment due at time of enrollment.**

If you have any questions about the program, please contact the instructors Linda Hewitt at [lindahewitt@msn.com](mailto:lindahewitt@msn.com), 714/777-0294 or Nancy LeClaire at [nancy\\_leclaire@yahoo.com](mailto:nancy_leclaire@yahoo.com), 310/373-3223.



# UC IRVINE EXTENSION ENROLLMENT FORM

(949) 824-5414 (Office) • (949) 824-2090 (Fax) • PO Box 6050, Irvine, CA 92616-6050 • [unex-services@uci.edu](mailto:unex-services@uci.edu)

<b>REG #/QTR</b>	<b>COURSE DEPARTMENT NAME AND #/TITLE</b>	<b>FEE</b>
00459/12WI	PFP Accelerated Program/MISC 933.25	\$4,200

### STUDENT INFORMATION:

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Social Security Number - - Date of Birth / / Gender [ ] Male [ ] Female

Day Phone ( ) \_\_\_\_\_ Alternate Phone ( ) \_\_\_\_\_

Email Address \_\_\_\_\_

Employer Name \_\_\_\_\_

Employer Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

### PAYMENT PLAN (Please check one and sign below):

**Yes**, I would like to enroll for the PFP Accelerated Program and Review course under the payment plan outlined below. By signing below, I understand and agree that my credit card account listed will be charged for each subsequent payment on the dates specified. I understand that I must contact the UCI Extension Student Services Office prior to the payment deadline date if I wish to use a different form of payment. I understand that it is my responsibility to remit payments by the stated deadlines. Failure to do so may result in the withholding of my grades and/or transcripts, not being allowed to attend class, and the reporting of my account to a collection agency for further action.

**No**, I will pay the full course fee at the time of registration. By signing below, I understand that I will be charged the full program fee due at the time of registration.

Payment Date	Payment Amount	Payment Date	Payment Amount	Payment Date	Payment Amount
At Registration	\$1,500	April 30, 2012	\$1,350	May 31, 2012	\$1,350

*Student Signature* \_\_\_\_\_

*Date* \_\_\_\_\_

### PAYMENT INFORMATION:

American Express       MasterCard       Visa       Check (Payable to UC Regents)

Credit Card # \_\_\_\_\_ Expiration Date \_\_\_\_\_ / \_\_\_\_\_

Cardholder Name \_\_\_\_\_

Billing Address \_\_\_\_\_

Authorizing Signature \_\_\_\_\_

FOR UC IRVINE EXTENSION STUDENT SERVICES OFFICE USE ONLY:					
STUDENT ID NUMBER		DISCOUNT CODE		DISCOUNT AMOUNT	
FIRST PAYMENT		DATE RECEIVED		VERIFIED BY	
SECOND PAYMENT		DATE RECEIVED		VERIFIED BY	
THIRD PAYMENT		DATE RECEIVED		VERIFIED BY	