

Personal Financial Planning Accelerated Program – Fall 2009 (Reg# 00017)

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

*** To be eligible to sit for the CFP® Examination, you must complete the PFP Accelerated Program modules AND the CFP® Review Course.**

It is held at the Learning Center in Orange (200 S. Manchester Ave, Orange) on Thursdays – Sundays (four 8:00am-6:00pm meetings on each subject) from November 12, 2009 – April 25, 2010. **The Accelerated Program cost 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. Below are the subjects and dates:

CFP 1 - The Financial Planning Process and Insurance: November 12 – 15, 2009
CFP 2 - Investment Principles: January 7 – 10, 2010
CFP 3 - Income Tax Planning: February 4 – 7, 2010
CFP 4 - Employee Benefits and Retirement Planning: March 18 – 21, 2010
CFP 5 - Estate Planning: April 22 – 25, 2010

Note: A series 7 license is highly recommended.

**** Program fee does not include required materials (Study Guides). Study Guides are \$150 plus shipping & handling for each module. Instructions will be noted on your enrollment confirmation.**

There are substantial pre-work assignments. Enrollments after November 2 must be approved by the instructors.

* Review Course for the CFP® Certification Examination

Dates: Friday-Sunday, June 4, 5, 6, 11, 12, 13, 2010 from 8:00am-5:30pm
Location: UCI Learning Center
Fee: \$1,250 (\$1,100 for PFP Accelerated Program students; Must register in person or by phone)

This 6-meeting review course is intended for those who have completed the Accelerated Program or equivalent and are planning to sit for the CFP® Certification Examination in **July 2010**. This intensive course covers all 89 CFP® Board topics tested on the exam. *Students are highly encouraged to purchase review course study materials at an additional cost prior to the live review. You may purchase the study materials from the College for Financial Planning at 800/237-9990 or Keir Educational Resources at 800/795-5347.*

We do offer a payment plan for the Accelerated Program:

\$1,500 at time of enrollment
\$1,350 due December 31, 2009
\$1,350 due January 31, 2010

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. If she's 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.**

CFP® Review 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, 714/777-0294 or Nancy LeClaire at 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

REG #/QTR	COURSE DEPARTMENT NAME AND #/TITLE	FEE
00017/09FA	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	Dec 31, 2009	\$1,350	Jan 31, 2010	\$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	