

Personal Financial Planning Accelerated Program – Spring 2010 (Reg# 00076)

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 April 15, 2010 – August 22, 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: April 15 – 18, 2010

CFP 2 - Investment Principles: May 20 – 23, 2010

CFP 3 - Income Tax Planning: June 24 – 27, 2010

CFP 4 - Employee Benefits and Retirement Planning: July 22 – 25, 2010

CFP 5 - Estate Planning: August 19 – 22, 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 April 5 must be approved by the instructors.

* Review Course for the CFP® Certification Examination

Dates: Friday-Sunday, *Dates TBA (sometime in October)*, 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 **November 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 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 May 31, 2010

\$1,350 due June 30, 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 |
| 00076/10SP | 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 | May 31, 2010 | \$1,350 | June 30, 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 | |