

Eastern Michigan University—Department of Accounting and Finance

Certified Financial Planner (CFP) Education Program—Overview

Brief Description: The Certified Financial Planner designation is a 20+ year old program sponsored by the CFP Board of Standards, Inc. (a nonprofit organization) now headquartered in Washington DC. A national exam is given in March, July, and November of each year. One way an applicant for the CFP certification examination can meet educational requirement is to complete a CFP Board-Registered Education Program. EMU is one of those authorized providers.

EMU Program: EMU offers six courses in a hybrid, non-degree program designed to meet the educational requirements to sit for the CFP exam. Classes are held in Ypsilanti at the Eagle Crest Conference Center off I-94 at the Huron Street exit. Each course has 36 contact hours: ½ of these are in-person meetings with the professor in six three-hour classes, usually held every other week; the other ½ of the contact hours are spent off-site in on-line learning using EMU's e-college Web-based course management tool. The following courses do not have to be taken in order, but it is suggested that the General Principles course be taken first as an introduction to the program and the CFP profession.

<u>Course</u>	<u>Instructors</u>	<u>Semester offered</u>
General Principles of Financial Planning	Gary Salach, MBA, CFP	Spring/Summer, Fall
Investment Planning	Bob Kiss, CFA	Spring/Summer, Fall
Employee Benefits and Insurance Planning	Bob Okopny, Ph.D., CPA, CFE	Spring/Summer, Winter
Income Tax Planning	Linda Burilovich, Ph.D., CPA	Spring/Summer, Winter
Estate Planning	Andy Burilovich, JD	Fall, Winter
Retirement Planning	Linda Burilovich, Ph.D., CPA	Fall, Winter

Spring/Summer is approx. May 21 – July 31

Fall is approx. September – November

Winter is approx. January 22 – April 3

Cost: \$595 per course. For more details and to apply, go to www.ce.emich.edu/noncredit.html . Other information about the CFP is available at www.cfp.net

Contact Persons:

Dr. Linda Burilovich, EMU Professor of Accounting at linda.burilovich@emich.edu

Ms. Pat Breilein, Continuing Education at pbreilein@emich.edu