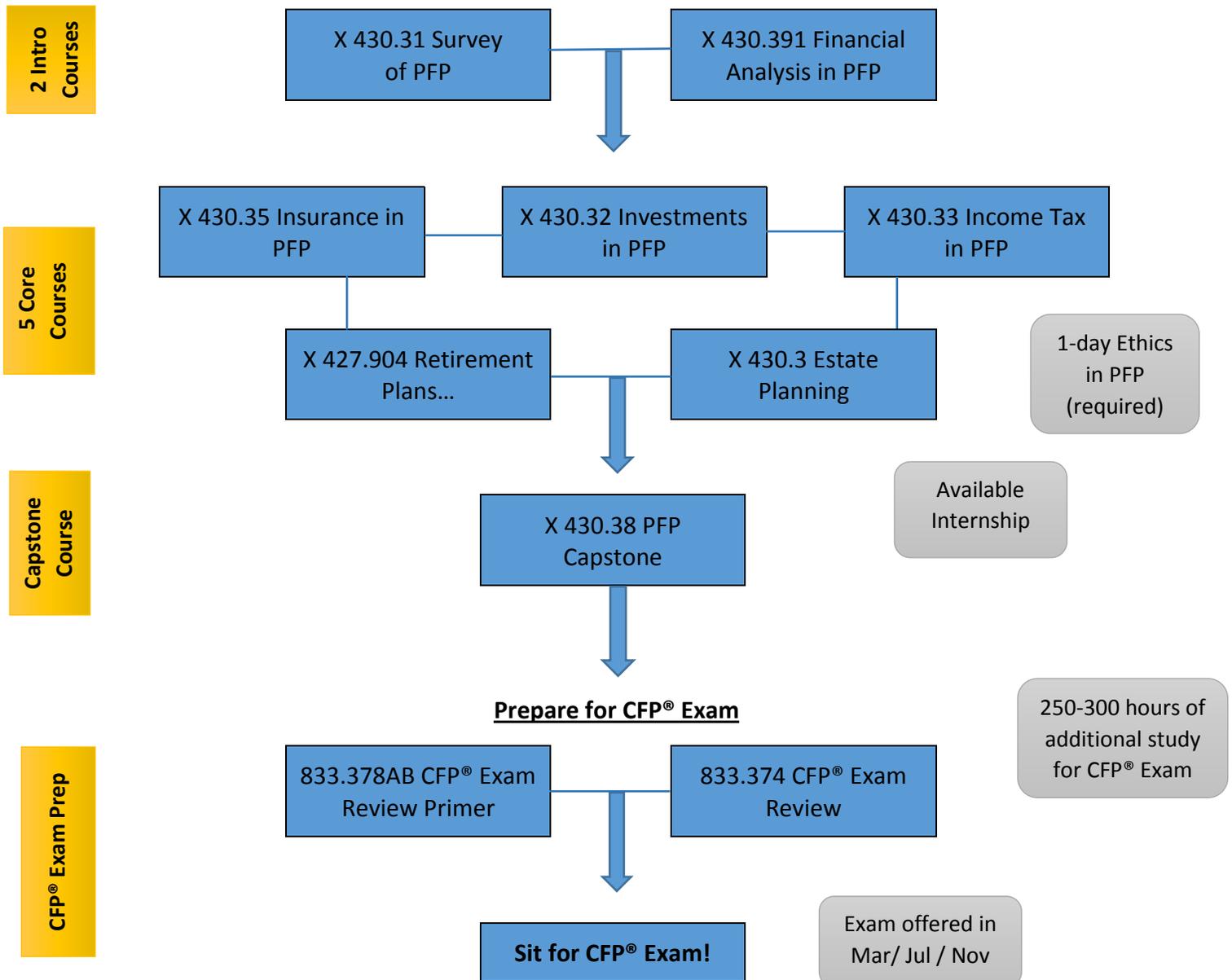


Personal Financial Planning Certificate

PFP Certificate Survival Guide

UCLA Extension’s traditional 8-course PFP certificate program is ideal for individuals who are considering a career transition into the financial planning profession or for current financial professionals who wish to expand their knowledge and career prospects. The program fully meets the educational component for CFP® Certification, covering the topics that form the basis for the examination. Students can complete the required curriculum within 15 months to two years. Learn more at uclaextension.edu/pfp_programs

Pathway to Certificate Completion & CFP® Exam



Additional Certificate Information & Tips

- Students have the flexibility to complete their coursework through evening classes held at UCLA and the downtown LA center, or through instructor-led online classes.
- Students must receive a minimum 2.5 GPA or better for courses completed in the certificate and a grade of “B” or better for X 430.38 Personal Financial Planning Capstone course. Students receiving a grade of “B-” or lower for X 430.38 must repeat the course.
- To officially enroll in the PFP certificate an *Application for Candidacy* and nonrefundable application fee of \$200 must be submitted. Students are encouraged to enroll in the certificate after completing the two intro courses in the program.
- The 1-day *Ethics in Personal Financial Planning* is required and can be taken at any time during the program
- Students who are planning to sit for the CFP® Exam should complete the PFP certificate program within 15 months to 2 years and then plan to sit for the exam within the next six months. Students should also prepare for 250-300 hours of exam prep study which includes the CFP® Exam Review classes.
- Certificate Students are highly recommended to establish a CFP Board Account at cfpboard.net in order to receive the most current information and updates about CFP® certification requirements. Establishing an account with CFP Board also enables you to apply for the CFP® Certification Examination once you’ve completed the education coursework requirement for CFP® certification.
- Certificate Students are encouraged to join the Financial Planning Association (FPA) at OneFPA.org and to participate in the local chapter events and activities, including the FPA NexGen community. FPA members also receive a 10% discount off all UCLA Extension PFP classes.
- Join UCLA Extension’s [PFP LinkedIn Group](#) to network with fellow students & graduates.
- The *Joseph G. Devanney Scholarship Fund* is awarded each academic quarter to offset course fees for the X430.38 Personal Financial Planning Capstone course (classroom or online). Certificate students must complete an application form, including a 250-word typed essay.
- UCLA Extension has established an articulation agreement with California Lutheran University’s California Institute of Finance where Cal Lutheran will accept up to 15 units (five courses) from UCLA Extension’s PFP Certificate as credit towards their Master of Business Administration in Financial Planning.