

Financial Planning

FINANCIAL PLANNING FUNDAMENTALS CEFN-801

This course introduces the fundamentals important to the discipline of financial planning. Students will acquire an understanding of the concepts and applications associated with financial calculations and the analysis of financial statements. The basic concepts of contracting and family law are covered followed by an analysis of government-sponsored benefit programs. This course offers Modules 1-4.

CONTEMPORARY PRACTICES IN FINANCIAL PLANNING CEFN-802

This course introduces students to basic income tax laws and moves into a more advanced understanding, as it relates to areas of financial planning. A review of the professional and ethical responsibilities associated with the role of a financial planner and an understanding of the structures and services within the financial industry are covered in the course. Different forms of business structures are explored in-depth, along with an understanding of trusts. This course offers Modules 5-8.

Prerequisite: Financial Planning Fundamentals CEFN-801

COMPREHENSIVE PRACTICES IN RISK & RETIREMENT PLANNING CEFN-803

Designed to provide students with a comprehensive understanding of the principles and applications related to the concepts of managing risk and retirement planning, this course covers products, issues, and practices in the area of insurance and retirement. Included is an understanding of the risk management process along with the retirement planning process moving through the wealth accumulation phase into retirement. This course offers Modules 9-14.

Prerequisite: Contemporary Practices in Financial Planning CEFN-802

WEALTH MANAGEMENT AND ESTATE PLANNING CEFN-804

Students will review the basics of economics and investing along with an understanding of investment products. Investment planning and key areas of personal financial management are explored. The course concludes with estate planning fundamentals, concepts and applications. This course offers Modules 15-19.

Prerequisite: Comprehensive Practices in Risk & Retirement Planning CEFN-803

Note: A three-hour practice exam to confirm complete knowledge and preparation for the CFP™ Examination is included upon successful completion of the four courses.

How to register

REGISTER with Enrolment Services (registrar's office) in one of the following ways:

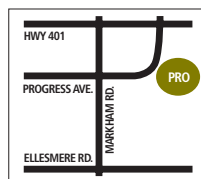
- Online – centennialcollege.ca/webreg (credit card needed), or
- Phone **416-289-5300** (credit card needed), or
- Visit any campus Enrolment Services in-person, or
- Fax a registration form to Enrolment Services at **416-289-5279** (credit card needed) or
- Mail the registration form to Enrolment Services, P.O. Box 631, Station A, Toronto, Ontario, Canada M1K 5E9 (certified cheque, money order or credit card)

Register early; classes fill quickly!

www.centennialcollege.ca/future/howtoreg.jsp

How to find us

Our courses are offered evenings, weekends and by distance learning. For locations, see centennialcollege.ca/map



PROGRESS CAMPUS
941 Progress Ave.



ASHTONBEE CAMPUS
75 Ashtonbee Rd.

For more information:

Centennial College
P.O. Box 631, Station A
Toronto, ON, Canada M1K 5E9
416-289-5207
Email: lbois@centennialcollege.ca
Web: centennialcollege.ca/accounting

TO REGISTER: go online to centennialcollege.ca/webreg, call 416-289-5300 or visit any campus Enrolment Services office.



Continuing Education – part-time evening, weekend and online courses and programs.

centennialcollege.ca/ce

The Future of Learning

Financial Planning Program Code 7053

In partnership with CCH Canadian Limited and Advocis™
(Canadian Association of Insurance and Financial Advisors)



Financial planning is the process by which a financial planner determines a client's financial needs and objectives, and uses this information to develop a personalized program of savings and investments to help clients realize their goals. Achieving financial security is a complex process. Financial markets, taxation laws, investments and investment strategies grow ever more intricate and complicated.

FINANCIAL PLANNING

Centennial offers a certificate of achievement in **Financial Planning** for those who want to help clients achieve financial security, as well as for those who simply want a better understanding of the complex financial world around them, to enable them to structure their own financial affairs to best suit their needs and objectives.

CERTIFIED FINANCIAL PLANNER

Or consider The **Certified Financial Planner** program, which includes the same four courses; however, you must achieve a minimum of 60% in each course for CCH/Advocis certification. Offered in partnership with Advocis (the Financial Advisors Association of Canada) and CCH Canadian Ltd., the lead professional publisher of reference material in tax and financial planning, the CFP™ designation marks financial planners as qualified to practice as professionals.

For those pursuing the CFP™ program, the opportunities are endless, and include mutual fund representative, self-employed financial planner, financial planning companies, bank or trust company officer, discount brokerage investment representative, life insurance companies, full service investment advisors, credit unions, full service brokers, investment fund companies, or companies that provide financial services and products to individuals.

COMPLETION REQUIREMENTS

Courses should be completed in the order listed:

Course 1: Financial Planning Fundamentals	CEFN-801
Course 2: Contemporary Practices in Financial Planning	CEFN-802
Course 3: Comprehensive Practices in Risk & Retirement Planning	CEFN-803
Course 4: Wealth Management and Estate Planning	CEFN-804

Note: To receive a certificate of program qualification from CCH/Advocis, a minimum grade of 60% for each course is required



For more information about the CFP™ Education Program, contact: Advocis at 1-877-773-6765, e-mail: info@advocis.ca or on the web: www.advocis.ca

If you are pursuing the CFP™ Education Program, please call 416-289-5200 ext. 2258 or e-mail lbois@centennialcollege.ca when you have successfully completed all four courses, so grades can be submitted to CCH/Advocis for preparation for the Advocis exam.

For dates/times/costs, visit centennialcollege.ca/accounting. For more information about Centennial's part-time studies in accounting, contact lbois@centennialcollege.ca, 416-289-5000. ext. 2258.