CERTIFIED FINANCIAL PLANNER ™
Certification Education Program

NORTHWESTERN UNIVERSITY

Financial Planning Course of Study

- A CFP Board-registered program that fulfills the education requirement for candidates seeking the CFP® certification
- Offered in conjunction with The BOE Institute, LLC
- Courses offered at the Northwestern University loop campus, 210 South Clark Street, Chicago, Illinois

Course of Study

- An accelerated format, allowing students to complete the seven educational modules and sit for the national certification exam in a 15-month period . For example, a student beginning the course of study in September 2010 will be prepared to take the CFP certification exam in November 2011.
- A unique blend of traditional classroom and online lessons maximize the learning experience
- Once-a-month Friday and Saturday sessions bring students in-person instruction from highly qualified instructors

…Course of Study Continued

- Classroom meetings are supplemented by online learning delivered through the BOE Institute’s educational system, taken at the student’s convenience

- Upon completing the seven modules of study students have approximately three months to prepare for the CFP® certification exam

Chicago September 2010 Offering

1. Financial Planning Process: September 10-11
2. Insurance Planning: October 15-16 and November 19-20
3. Income Tax Planning: December 10-11 and January 7-8, 2011
4. Investment Planning: February 4-5 and March 4-5
5. Retirement Planning: April 8-9 and May 6-7
6. Estate Planning: June 10-11 and July 8-9
7. Case Study Preparation: August 5-6

Hours and Examinations

- Each classroom meeting lasts from 9 AM to 5 PM.
- Online lessons and supplements reinforce key concepts and offer sample questions and case studies
- Final examinations are administered immediately before starting a new module. That is, the final exam for the Financial Planning Process module is offered in October, in the week prior to beginning the second module. Students have a five-day window in which to take the exam online, with up to 3 hours to complete each exam.

...Hours and Examinations continued

- Following this pattern, the Insurance Planning final is given in December, the Income Tax Planning final in February, and so on.
- The Case Study module is a 2 day session in August, with one of the days spent reviewing an actual financial plan developed by students. The second day is devoted to learning the case-study format presented on the certification exam.
- An overall grade of "C" (generally a 70% score) is required to successfully complete a module

Our Instructors

- Northwestern arranged with The BOE Institute to provide instructors for the entire sequence of courses
- Members of The BOE Institute are all financial planning practitioners recognized as subject matter experts. Each possesses multiple designations and all are CFP® professionals.
- Each member has also had extensive volunteer experience with the Certified Financial Planner Board of Standards and its examination and item development processes

…Our Instructors continued

- Scheduled instructors are:
  - Craig LeBouef, MBA, CPA/PFS, CFP®
  - Mark Wilson APA, CFP®
  - Richard Potter, MBA, CLU, ChFC, CFP®
  - Gary Englund, JD, CLU, ChFC, AEP, MSFS, RHU, REBC, CDFA, CLTC, CAP, CFP®
- Individual biographies of each of our instructors may be found at www.boeinstitute.com

Program Cost

- Modules may be paid for on an as-you-go basis. The first module costs $775, modules 2-6 cost $900 each. This tuition includes all required books, supplements and other resources.
- The cost of the final case study session is $500, producing a total program cost of $5,775.
- Students wishing to pay for the entire program upfront receive a discounted price of $5,375.
- All program payments are non-refundable.

Materials and Inclusions

- Twenty-two full days of classroom instruction covering six modules
- An additional two-day case study course
- All required textbooks and industry-leading supplemental materials for each module
- An online financial calculator course

… Materials and Inclusions continued

- Access to online review material and supplemental questions for each module
- All students are provided with a demo version of Money Guide Pro™ financial planning software for use throughout the cohort duration.
- Investment module students have access to a trial version of industry-leading Morningstar software during that module.

Comprehensive Review

- Northwestern University partners with Keir, Inc., to provide the comprehensive review portion of the cohort.
- This course follows the Case Study module and gives students the necessary final preparation to help them pass the certification exam.

Where We Differ

- We offer an educational experience designed to broaden and further the student's financial planning capabilities, not just to pass a test
- Academic Integrity. This is an accelerated cohort; not a shortcut. Classes meet for the proscribed hours and use examinations which measure the student's academic progress
- We believe programs that have an instructor teach all six modules are cheating their students. Our faculty members are recognized subject matter experts, and teach only modules in their area of expertise. They draw from their own practical experience to enrich the classroom experience.

… Where We Differ continued

- The case study module is taught at the completion of the sixth module so that students have the subject knowledge required for comprehensive and integrated case study questions
- Industry leading financial planning and investment software give students practical experience for dealing with multiple client scenarios
- The use of supplemental materials and outside review course providers brings students the resources of multiple educational providers, minimizing the chance that any required topic will not be covered fully

Registration

- All program registrations and tuition payments are handled through the facilities of The BOE Institute, LLC.
- www.boeinstitute.com
- Tuition discounts are available to members and student members of their local professional associations, including FPA, NAIFA , SFSP chapters, Bar Associations and Estate Planning Councils.

Additional Information

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