Northwestern University's CERTIFIED FINANCIAL PLANNER™ Accelerated Program

The CERTIFIED FINANCIAL PLANNER™ Certification Education Program is offered through Northwestern University in conjunction with The BOE Institute, LLC. Completion of the program fulfills the education requirement for persons seeking the CERTIFIED FINANCIAL PLANNER™ certification.

Accelerated Course

The modules will be taught on a concentrated format, allowing completion in a twelve-month period. Students starting with the January 2010 schedule of classes will be prepared to sit for the March 2011 CERTIFIED FINANCIAL PLANNER™ Certification Examination. The 2010 schedule of classes:

January 14, 15 and 16 2010
Financial Planning Process
February 12-13 and March 12-13
Insurance Planning
April 16-17 and May 14-15
Investment Planning
June 11-12 and July 9-10
Income Tax Planning
August 13-14 and September 10-11
Retirement Planning
October 8-9 and November 12-13
Estate Planning
December 10-11
Case Study Course

Most classes will meet one Friday-Saturday per month (9:00 AM to 5:00 PM), with only the first module being a three-day session. Classes will be held at the NU Chicago Loop campus.

Homework, Attendance & Testing

There will be an assigned textbook, supplemental reading, practice questions and financial planning software exercises for each module. Significant study time will be expected between the scheduled class sessions. Students are highly encouraged to attend all sessions. The final exam for each module is offered online in the week prior to beginning the next module. For example, students will be given a five-day window, beginning February 6, 2010, to take the Financial Planning Process final exam. The exam is offered online and must be completed in a single three-hour period. Upon completion of all Northwestern University classes students are encouraged to attend a comprehensive review course prior to the CFP® Certification Examination. The Northwestern University program partners with Keir, Inc., to give students the final preparation needed.

Acclaimed Instructors

All instructors are highly qualified practitioners with significant classroom experience and expertise. Scheduled instructors for modules include:

- Craig Le Bouef, MBA, CPA/PFS, CFP®;
- Mark Wilson APA, CFP®;
- Richard Potter, CLU, ChFC, MBA, CFP®;
- Richard Ploss, JD, CPA, MBA, CFP®
- Gary Englund, JD, CFP®, CLU, ChFC, AEP, MSFS, RHU, REBC, CDFA, CLTC, CAP.

Registration and Fees

The program includes the following:

- 23 full days of instruction from highly qualified professionals
- An additional 2-day session devoted to comprehensive case studies
- All required textbooks
- Industry-leading supplements for each module and the Case Study course
- HP 12C Financial Calculator supplement
- Industry-leading financial planning software

The total cost of the program is $5500, which includes everything listed above. Tuition for each of the six modules is $850, required approximately 30 days before the start of each module. The cost of the final case study weekend is $400. Students paying for the entire program upfront pay a discounted price of $5100; all program payments are nonrefundable. A $25 discount from the cost of each module will be given for FPA, NAIFA and SFSP members and student members. An initial payment of $250 by check or credit card authorization for the first module must accompany all registration forms. Upon registration students will be sent the training course for the HP 12C calculator, to be completed prior to the first class session. All program registrations must be made at www.boeinstitute.com.

For additional information: Contact Gary Englund at 773-599-7152 or by e-mail at gary@boeinstitute.com