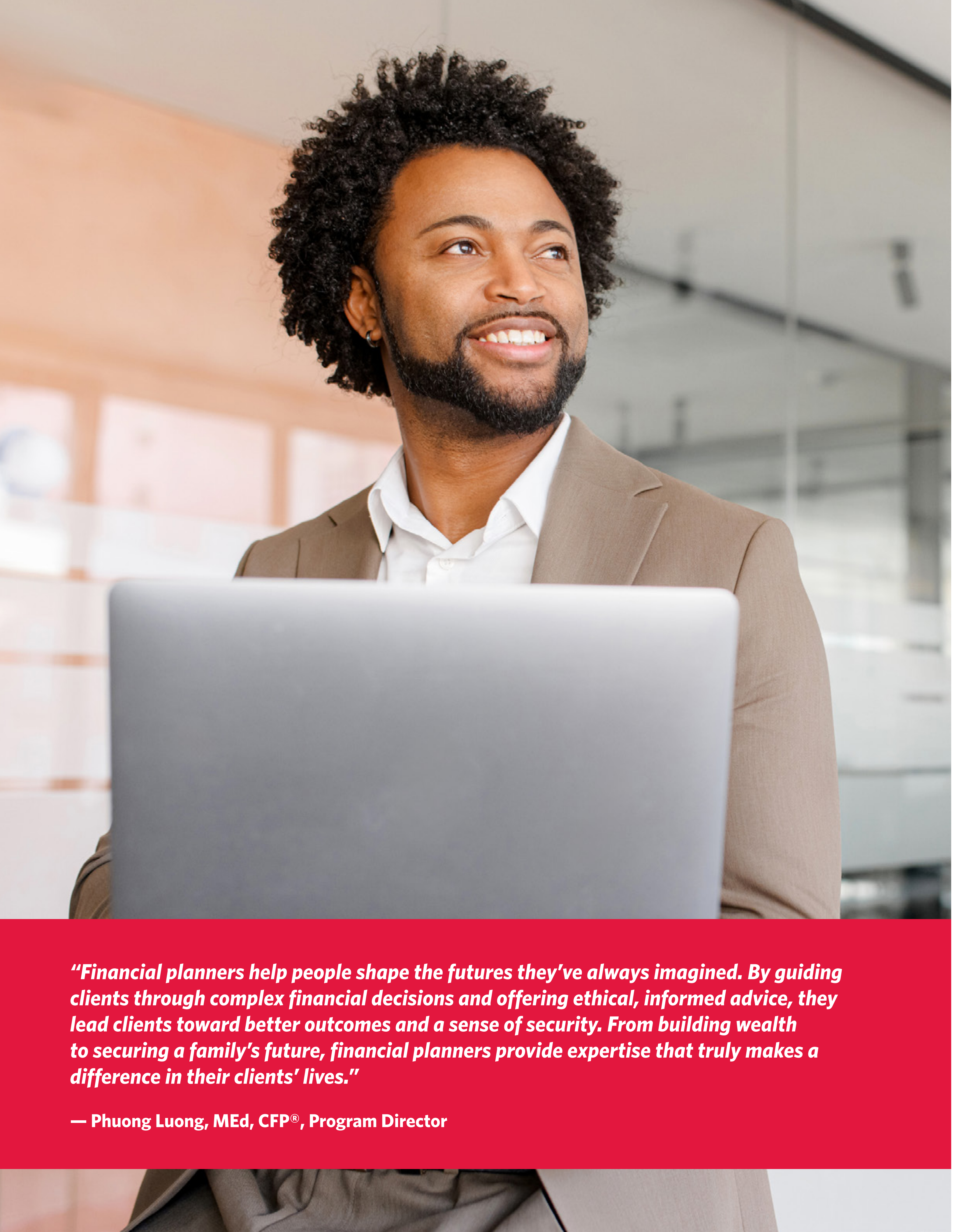
A Career Investment That Pays Dividends

Financial Planning Program

BOSTON UNIVERSITY

Boston University Metropolitan College
Center for Professional Education

FINANCIALPLANNINGONLINE.BU.EDU



"Financial planners help people shape the futures they've always imagined. By guiding clients through complex financial decisions and offering ethical, informed advice, they lead clients toward better outcomes and a sense of security. From building wealth to securing a family's future, financial planners provide expertise that truly makes a difference in their clients' lives."

— Phuong Luong, MEd, CFP®, Program Director

Invest in Skills That Transform Futures

Transform your career into one that helps others thrive. Whether you're starting out, changing paths, or advancing your expertise, Boston University's Financial Planning Program prepares you to guide clients toward financial security using sound, informed decisions.

As a recognized leader in online financial education, we have a proven track record of helping students excel in their careers on their own schedule and at an affordable price.

Our self-paced online program combines independent study, asynchronous video content, and opportunities for live learning, making it ideal for professionals who are juggling responsibilities.

Backed by over forty years of excellence in financial education, we provide the flexibility, support, and expertise you need to reach new heights in financial planning.

About the Program

The Financial Planning Program combines online flexibility with personalized support. Register anytime for 24/7 access to our comprehensive curriculum and start mastering all the topics covered in the CFP® exam. You'll develop a deep understanding of practices and regulations that apply to a wide range of financial services, including estate planning, risk management, and investing.

Our team offers support whenever you need it: Course facilitators answer emailed questions within approximately 24 hours, and you'll have regular opportunities to attend review sessions with CFP® professionals.

Other benefits of this program include:

- **Affordable tuition**, offering exceptional value
- Meets **CFP® exam educational requirements**
- Courses led by **practicing financial planners**
- **Gain career-ready skills through a Capstone** with real-world planning scenarios

By the time you complete the program, you'll have the knowledge to pass the CFP® exam, advance to new career roles, and help your clients create more secure financial futures.

Exceptional CFP® Exam Pass Rate

Over the past ten years, BU students who sat for the CFP® exam passed at a rate higher than both the national average and that of comparable programs.

From Certificate to CFP®: Boston University's Financial Planning Pathway

As a CFP Board Registered Program, the Financial Planning Program satisfies the educational requirement to register for the CFP® exam and is designed to help you pass with confidence.

After passing the CFP® exam, you'll have five years to fulfill any outstanding educational and professional requirements for certification, such as earning a bachelor's degree and working as a financial planner.

For more information, visit the CFP® Board website.

Financial Planning Courses

The program can be completed in nine months when working at an accelerated pace, but learners have access to the course content for twenty-one months upon registering for the full certificate.

The Financial Planning Program is designed for flexibility, allowing you to start at any time and progress on your own schedule. The program includes seven courses, each consisting of twelve to fourteen modules.

Introduction to Financial Planning
Gain deep insight into the financial planning process and master foundational principles of the field.

Insurance and Risk Management
Explore risk management and learn how to use insurance and other tools to minimize your clients' exposure.

Investments
Gain insight into all aspects of investment while building the skills to construct and evaluate portfolios.

Tax Planning
Review the tax implications of a range of financial activities, with a focus on minimizing tax liability.

Retirement Planning and Employee Benefits
Learn how to assess retirement plans and make appropriate recommendations for both individuals and business owners.

Estate Planning
Examine federal estate and generation-skipping transfer taxes, learn techniques to minimize their impact, and consider how to balance tax strategy with other concerns.

Capstone Course in Financial Planning
Apply your knowledge by developing a comprehensive financial plan that meets CFP Board standards and presenting it to a hypothetical client.

- **Take the Capstone your way:** You can choose a **self-paced option** or join an **instructor-led version** that features regular live sessions and expert guidance.

"The review questions throughout the courses really showed me what I needed to work on, and I passed the CFP® exam on my first try. From start to finish, it took less than a year."

— Angela DeLion, CFP®, Ameriprise Financial

Accelerated Path

The CFP Board recognizes several credentials that can stand in for most educational requirements for certification. If you hold one of these academic degrees or professional licenses, you may qualify for our **Accelerated Path Program**. Eligible students only need to complete our Capstone course to meet the education requirement for the CFP® exam.

Approved Degrees and Professional Credentials

- PhD in Financial Planning, Fiance, Business Administration, or Economics
- Doctor of Business Administration
- Licensed attorney
- Licensed Certified Public Accountant (CPA)
- Chartered Financial Consultant (ChFC)
- Chartered Life Underwriter (CLU)
- Chartered Financial Analyst (CFA®)
- CFP® certification from the Financial Planning Standards Board Ltd. (FPSB) Affiliate located in your territory of residence outside the U.S.

An Industry Leader in Financial Education

For over forty years, Boston University has been at the forefront of financial planning education, offering affordable, in-depth courses that help professionals excel in this complex field.

Our commitment to accessibility is matched by our dedication to excellence in online learning: our courses have earned prestigious accolades such as the Online Learning Consortium Award for Excellence in Online Teaching and Learning and the U.S. Distance Learning Association Award for 21st Century Best Practices.

When it comes to professional education, Boston University sets the standard for quality, innovation, and student success.

Tuition

At the Boston University Center for Professional Education, we are dedicated to making career advancement accessible to all who can benefit. Our Financial Planning Program offers high-quality courses at a reasonable price, enabling you to confidently invest in your future.

Most learners will benefit from enrolling in the full program, which saves 15% on tuition. Alternatively, you can pay for one course at a time.

To support individual needs, we also offer a range of payment options, including a two-installment, interest-free payment plan for the full certificate.

Course Options

Online Financial Planning Program
Ideal for those pursuing CFP® certification who want to progress at a steady pace and save money. **Compared to purchasing individual courses, enrolling in the full program saves an average of 15% on tuition.**

Full Program	Tuition
Online Financial Planning Program Access to seven courses for twenty one months	$4,395*

**Does not include course books or calculator*

Single Courses
Best for those who prefer to pay as they go and complete the program one course at a time.

Single Courses	Tuition
Individual Course (six courses) Three months of access to course materials	$695* per course
Capstone Course (one course) Three months of access to course materials	$995*

**Does not include course books or calculator*

Accelerated Path
Intended for professionals who hold specific credentials that help fulfill the education requirement for CFP® certification.

Accelerated Path	Tuition
Capstone Course in Financial Planning Three months of online access to course materials	$995*

**Does not include course books or calculator*

Payment Options

We offer several affordable ways to finance your education.

Pay in Full
Make a simple, one-time payment with a credit or debit card.*

Payment Plan
Pay in two interest-free installments.

Education Loans
Seek private, credit-based financing.

Scholarship opportunities are also available. The merit-based Robert J. Glovsky Scholarship Fund awards up to $2,000 per year to selected Financial Planning Program students, with a preference for those serving traditionally undeserved populations. We will reopen the call for applications in summer 2025. Additional scholarships can be found on the CFP Board website.

Please note: Payment information must be submitted in order to access course materials. For any questions about payments or financing your education, contact an enrollment advisor, at (857) 971-4728.

**Visa, Mastercard, American Express, and Discover accepted*

Books and Materials

You will need seven books for this program, one for each course.

You will also need access to an HP12C financial calculator which can be purchased from various retailers. For more information on this device, visit the Hewlett Packard website. If you need guidance on using a financial calculator, we offer video tutorials in our courses. The book *Financial Calculator Essentials*, available for purchase from Dalton Education, can also provide support.

Registration

Who Should Enroll in This Program?
This program is open to learners from all professional and academic backgrounds. It is recommended that students hold a bachelor's degree, since it is required for CFP® certification, but this is not mandatory to begin the program.

How to Get Started
Learners have the flexibility to register for the full certificate, which can be completed in as little as nine months, or register for one course at a time. Whichever you choose, you will gain 24/7 access to course material, including instructional webinars, once your registration has been processed.

To get started, add the course to your cart, create a MyCPE account and choose your payment method. As part of this process, you'll be asked about any prior affiliation with Boston University to ensure accurate records and avoid duplicates. Payment information must be submitted in order to access course materials.

Once you've registered, you'll receive a welcome email from Boston University in advance of your first course. Additional emails about program logistics will follow.

About Boston University

Founded in 1839, Boston University is an internationally recognized institution of higher education and research. With more than 33,000 students, it is the fourth-largest independent university in the United States. The distance learning experience at Boston University is designed to reflect the institution's ongoing commitment to academic achievement while still providing the unparalleled flexibility and convenience of online education.

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