Certified Financial Planner™

20-credit Technical Certificate

About the Certificate

WCTC's certificate in Financial Planning is an approved certificate by the CFP™ Board of Standards.

The CFP™ Board has rigorous standards for the Certified Financial Planner™ designation. In order to sit for the two-day, ten-hour exam, the candidate must complete the required education at an institution that is registered with the CFP™ Board such as WCTC.

What is a Technical Certificate?

A WCTC technical certificate provides an excellent means for those already employed in business to cross train or to expand their knowledge through short-term training opportunities.

For more information call 262.691.5200.

Required Courses — Credits

First Semester

114-190	Adv Financial Planning and Insurance	4
Total semester credits		**4**

Second Semester

114-191	Advanced Investments	4
114-195	Advanced Estate Planning and Trusts	4
Total semester credits		**8**

Third Semester

114-192	Advanced Tax Planning	4
114-193	Adv Retirement Plan Employee Ben	4
Total semester credits		**8**

Curriculum is current as of catalog printing.
The ability to complete a full certificate may be affected by low enrollment.

Certified Financial Planner™ Required Courses

114-190 Adv Fin Planning and Insurance 4
Learn about the financial planning process, and develop the skills necessary to do the complex Time Value of Money calculations that financial planners must be familiar with. Take an in-depth look at the four main areas of insurance: property, liability, life, and health. Incorporate each of these areas into a well-rounded financial plan.

114-191 Advanced Investments 4
Analyze how various types of investments fit into a financial plan. Take an in-depth look at stocks, bonds, and the securities markets. Develop an understanding of how changes in the economy affect the securities markets, and learn how to interpret corporate financial statements in order to help a client choose investments for a portfolio. Examine the multiple aspects of mutual funds, variable annuities, real estate, and collectibles. Study modern portfolio theory.

114-192 Advanced Tax Planning 4
Examine federal income taxation from the perspective of the individual. Discuss taxation law as it pertains to the taxation of investment income and losses (capital gains and losses). Analyze the advantages and disadvantages of various forms of closely held business entities.

114-193 Adv Ret Plan Employee Ben 4
Explore the various types of qualified retirement plans, non-qualified plans, types of insurance that might be included in an employee benefit package, and several other benefits, such as Section 125 plans. Analyze the Social Security system and its role in retirement planning.

114-195 Adv Estate Planning and Trusts 4
Explore gift and estate taxation and the advantages and disadvantages of different types of property ownership. Discuss trusts and their use in estate planning.