

DeSales University

ACCESS Certified Financial Planning Certificate Application

(This certificate may not be construed as a baccalaureate degree. Completion of certificate program satisfies the education coursework requirement in order to register for the CFP® Certification Examination. Completing the certificate program is not considered CFP® certification. To review all of the requirements in order to become a CFP®, please visit www.cfp.net)

Name

Last	First	Middle
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Mailing Address

Street		
City	State	Zip

Phone	Cell	Work
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ID # or Social Security #

Courses required for Certificate in Financial Planning (6 Courses)

Course #	Course Title	Date Completed
FN290	Personal Finance	
FN311	Income Tax Planning	
FN315	Retirement and Estate Planning	
FN342	Introduction to Risk Management	
FN361	Investments and Portfolio Management	
FN417	Financial Plan Development	

Note: No more than half of the total number of credits may be transferred to meet the requirements of the certificate

I acknowledge that I have received and read the [Gainful Employment Disclosure](#) for the Certified Financial Planning Certificate.

(Please Initial)

Student Signature	Date
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Advisor Signature	Date
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Division Head Signature	Date
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Dean of Lifelong Learning Signature	Date
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Application to be completed prior to pursuing Certificate. Certificate awarded upon completion of relevant coursework and payment of all fees. Certificates are mailed only in January or May of each year.