

DeSales University

Adult Studies 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

Mailing Address

Street

City State Zip

Phone Cell Work

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

Advisor Signature

Date

Division Head Signature

Date

Executive Director of Lifelong Learning Signature

Date

Application to be completed prior to pursuing Certificate. Certificate awarded upon completion of relevant coursework and payment of all fees.

Original to Registrar

Copies to Business Office and Adult Studies

9/24/19