UCLA Extension

Personal Financial Planning Certificate: Accelerated Online Program

September 2025-May 2026 Program Cycle

This rigorous online certificate program is designed for financial professionals with relevant work experience and credentials who are preparing for the CFP® Certification Examination. The 7-course curriculum is comprised of five core courses covering the major disciplines of financial planning and the required Financial Plan Development Capstone and Ethics courses. This is a cohort based program and enrollment is limited to those who have successfully completed their previous courses. The instructor-led online courses blend live, web-based sessions with online discussion boards, assignments, and testing. Students complete the curriculum within 9 months.

PROGRAM SCHEDULE

Each course (except for the Capstone which meets asynchronously with 3 live sessions) is scheduled over a 4-week period and includes two 3-hour live sessions each week. The weekly live sessions are scheduled on Tuesdays and Thursdays from 3-6pm PT and are also recorded for later viewing. Students are provided a two week window between courses to pre-study materials for the next course.

Core Courses:

Financial Planning Process and Insurance
MGMT X 430.511
September 23-October 16, 2025 Reg# 403249

Income Tax Planning
MGMT X 430.513
October 21-November 18, 2025 Reg# 404021

Investment Planning
MGMT X 430.512
December 2-18, 2025 and January 6-8, 2026 Reg# 403257

Retirement Planning
MGMT X 430.514
January 27-February 19, 2026 Reg# 404022

Estate Planning
MGMT X 430.515
March 17-April 16, 2026 Reg# 404023

Required Capstone Course:
Financial Plan Development and Presentation Course
MGMT X 430.516
April 27-May 31, 2026 Reg# 404024

The capstone course fully meets CFP® Board's educational standards requiring students to complete a financial plan development course. Completion of this course is also required for those who will be sitting for the CFP® Exam under a "Challenge" status.

Required Ethics Course:
Ethics in Personal Financial Planning
MGMT X 440
Offered quarterly.
Please note dates for this course are offered throughout the program cycle.

PROGRAM FEE: $6,370
The program cost includes fees for the five required core courses, Financial Plan Development capstone course, Ethics course, and the certificate candidacy fee. The program fee does not include the cost for the required pre-study materials, which students must purchase separately.

TO ENROLL

Students must submit an Application for Candidacy with a non-refundable application fee of $200 and enroll in the first course (MGMT X 430.511 Financial Planning Process and Insurance) approximately 1 month prior to the program start date. This will allow ample time to order and pre-study course materials for the first class session. Students are then recommended to enroll in the subsequent courses two weeks prior to each course section.

PROGRAM ORIENTATION

Wednesday, September 3, live online, 4:30-6:00pm PT

Attend our program orientation to get an overview of what's to be expected throughout the program, meet your instructors, and ask questions you may have.

View course page to register.

ABOUT OUR INSTRUCTORS

This program is taught by highly qualified and motivated instructors who have their CFP® certification and extensive teaching experience.

JOSEPH G. DEVANNEY SCHOLARSHIP

The Joseph G. Devanney Scholarship Fund was created for students pursuing a certificate in Personal Financial Planning at UCLA Extension. One scholarship is awarded per quarter to underwrite full course fees for either of the certificates' capstone course, MGMT X 430.38 Personal Financial Planning Capstone (PFP), or MGMT X 430.516 Financial Plan Development and Presentation (PFP Accelerated).

For more information, application deadlines, or to apply visit our scholarship page.

CFP® CERTIFICATION EXAMINATION

Students completing this program cycle are eligible to sit for the **July 2026 CFP® Certification Examination.** Contact the CFP® Board at (800) 487-1497 or visit *cfp.net* for exam dates and to register for the exam.

For more information on our program and to enroll please visit:
uclaextension.edu/pfp_accelerated

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