UCLA Extension

Personal Financial Planning Certificate: Accelerated Online Program

May 2026 - February 2027 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 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 PST 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
May 19 – June 11 Reg# - 408035

Investment Planning
MGMT X 430.512
July 7 – July 30 Reg# - 408036

Income Tax Planning
MGMT X 430.513
August 11 – September 3 Reg# - 408065

Retirement Planning and Employee Benefits
MGMT X 430.514
September 22 – October 15 Reg# - 408067

Estate Planning
MGMT X 430.515
November 3 – December 3 Reg# - 408070

Required Capstone Course:

Financial Plan Development and Presentation Course
MGMT X 430.516
January 4- February Reg# 408066

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 440
TBA

PROGRAM FEE: $6,700

The program cost includes fees for the five required core courses, Financial Plan Development capstone 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

April 20, livestreamed 5:30-7:00pm

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.

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). Visit our scholarship page for more information and application deadlines.

CFP® CERTIFICATION EXAMINATION

Students completing this program cycle are eligible to sit for the March 2027 CFP® Certification Examination. Contact the CFP® Board at (800) 487-1497 or visit *cfp.net* for exam dates and to register for the exam.

CFP® Exam Review

Students are encouraged to enroll in UCLA Extension's CFP® Exam Review Program to fully prepare for this difficult exam. Visit *uclaextension.edu/pfp_cfpreview* to learn more.

CFP®
Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER®, and CFP (with flame logo)®, which it awards to individuals who successfully complete initial and ongoing certification requirements.

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

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