SEQUENCE IN PERSONAL FINANCIAL PLANNING

What is the Sequence in Personal Financial Planning?

The Sequence in Personal Financial Planning is a set of courses approved by the Certified Financial Planner Board of Standards to prepare students to sit for the CFP® Certification Examination.

We have two CFP Board-Registered programs: the Sequence in Personal Financial Planning overlays either the B.S. in Finance or the B.S. in Business Administration, option in Insurance and Financial Services. In addition, the capstone course of our programs is also separately registered with the CFP Board of Standards.

What is the CFP® certification?

The CFP® certification is a professional certification for financial planners. The requirements for the certification include the education requirement, an examination, appropriate work experience, and an ethics requirement.

 Completing a CFP Board Registered Program at CSUN will satisfy the education requirement and allow you to sit for the CFP® Certification Exam. You can find more information about financial planning and the exam online at www.cfp.net/become-a-cfp-professional.

What does a CFP® Certified Financial Planner do?

A financial planner is a professional who advises clients on how to achieve their financial objectives in such areas as investing, insurance, taxes, education, retirement, and estate planning.


Personal Financial Planners are compensated well with an annual average wage above $108,000 according to the Occupational Employment & Wages, compiled by the U.S. Bureau of Labor Statistics in May 2014 (http://data.bls.gov/cgi-bin/print.pl/oes/current/oes132052.htm).
What are the requirements for the CFP Board-Registered Programs at CSUN?

You must be accepted into the Financial Planning program, complete the requirements for either the B.S. in Finance or the B.S. in Business Administration, Option in Insurance and Financial Services, and earn a “C” or better in each of the following six courses:

- FIN 303 Financial Management
- FIN 336 Principles of Insurance
- FIN 352 Investments I
- FIN 440 Retirement Planning and Employee Benefits
- FIN 446 Tax and Estate Planning
- FIN 442 Theory and Practice of Financial Planning

Students in good standing in the program receive permission numbers for FIN 440, 446, and 442.

How good is CSUN’s CFP program?

CSUN has ranked in the top tier of “Great Schools for Financial Planning” by Financial Planning for the last four years. Our students do well on the CFP exam and place well in the financial planning industry. We have internship and career placement relationships with several local and national firms.

Where can I go for more information?

Dr. Beck and Dr. Chiu offer advising for financial planning students on Wednesdays from 2:00-3:00pm in Juniper Hall 4110 or 4112. Students interested in the CFP program are encouraged to visit during office hours or schedule an appointment with Dr. Beck, Dr. Chiu, or Dr. Chira. Applications may be submitted at http://www.csun.edu/finance/application-sequence-personal-financial-planning.

We have regular Networking Events where students in the Financial Planning Program interact with professionals from the financial planning industry. Spring 2016 events are January 27th, February 17th, March 9th, and April 18th.

Where can I find more information on the CFP program & careers in financial planning?

For more information about CSUN’s CFP Program go to http://www.csun.edu/finance/financial-planning-at-csun, where you can apply to the program and RSVP for networking events.

Dr. Beck’s (unofficial) blog is https://financialplanningatcsun.wordpress.com/, where she collects financial planning industry news, internship and career information, and scholarship opportunities relevant to CSUN students.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board’s initial and ongoing certification requirements.