

2021 Personal Financial Planning Certificate Program Accelerated Format

This intensive in-depth format provides a client-centered, problem-solving methodology that includes case studies, giving you a hands-on approach to the material. Students in this program should have some experience working with clients.

Held in Irvine on UC Irvine campus*, this program consists of seven (7) courses. Each course consists of four full-day classroom meetings (two Sat/Sun from 8:00am-5:00pm) with an online component or project between the two weekends and an online exam the following week.

**Note: All classes will be offered remotely until further notice to ensure the safety of our staff and students.*

The accelerated program fee is **\$4,550****. Below are the subjects and dates:

Winter 2021	Financial Planning Process	January 23, 24, 30, 31
	Insurance Planning	March 6, 7, 13, 14
Spring 2021	Investment Planning	April 17, 18, 24, 25
	Tax Planning	June 5, 6, 12, 13
Summer 2021	Retirement Planning	July 10, 11, 17, 18
	Estate Planning	August 14, 15, 21, 22
	Financial Planning Practicum (Capstone)	September 18, 19 and October 2, 3

****Early Bird Discount:** Enroll in the Accelerated Program before December 7, 2020, and receive \$100 off tuition. Accelerated course fees do not include required textbooks and parking. Textbooks are approximately \$150 each (not including tax and shipping/handling). Textbooks list will be noted on your enrollment confirmation. Parking is \$50 per quarter.

Enrollment deadline is January 8, 2021. Email financeprograms@ceuci.edu for space availability after deadline.

We do offer a payment plan for the accelerated option:

\$1,300 due at time of enrollment ***
 \$1,300 due by March 31, 2021
 \$1,950 due by May 31, 2021

****If applicable, early bird discount is taken out of payment 1. Any other discount is applied to all 3 payments (limit to 1 corporate discount).*

You must register by email at dce-services@uci.edu (Attn: Julie Pyon) using the enclosed enrollment form. Online registration is not available for this program. For registration inquiries, please contact Julie Pyon at jpyon@uci.edu or at (949) 824-1728. If she is not available, please contact the Student Affairs & Student Services office at (949) 824-5414 and a representative will be available to assist you. **Please note if payments are not submitted prior to the due dates listed above, you will not be allowed to continue.**

If you have any questions about the program, please contact financeprograms@ce.uci.edu.

UC IRVINE DIVISION OF CONTINUING EDUCATION ENROLLMENT FORM

(949) 824-5414 (Office) • (949) 824-2090 (Fax) • PO Box 6050, Irvine, CA 92616-6050 • dce-services@uci.edu

TITLE	FEE
Personal Financial Planning Certificate Program (Accelerated)	\$4,550
CFP1-21WI #89, CFP2-21WI #90, CFP3-21SP #39, CFP4-21SP #40, CFP5-21SU #46, CFP6-21SU #47, CFP7-21SU #48	

STUDENT INFORMATION:

Last Name: _____ First Name: _____ MI: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Social Security Number: xxx – xx – _____ Date of Birth (MM/DD/YYYY): _____ / _____ / _____

Gender: ___ Decline to State ___ Female ___ Male ___ Non-Binary

Day Phone: () _____ Alternate Phone: () _____

Email Address: _____

Employer Name: _____

Employer Address: _____

City: _____ State: _____ Zip: _____

PAYMENT PLAN (Please check one and sign below):

Yes, I would like to enroll for the Personal Financial Planning Certificate Program (Accelerated) under the payment plan outlined below. By signing below, I understand and agree that I will be paying for each subsequent payment on the dates specified through a payment link. I understand that it is my responsibility to make payments by the stated deadlines. Failure to do so may result in the withholding of my grades and/or transcripts, not being allowed to attend class, and the reporting of my account to a collection agency for further action. I understand that I must abide by all deadlines for adding and dropping a course and that I am responsible for any late fees and/or drop fees that are assessed. If I find that I must drop the course, I will submit a written request to dce-drop@uci.edu. I understand that considerations for refunds of any payments are subject to review as long as I drop by the refund deadline.

Payment Due	Payment Amount 1	Payment Due By	Payment Amount 2	Payment Due By	Payment Amount 3
At Registration	\$1,300	March 31, 2021	\$1,300	May 31, 2021	\$1,950

No, I will pay the full course fee at the time of registration. By signing below, I understand that I will be expected to pay for the full program fee at the time of registration.

Student Signature **X** **Date**

FOR UC IRVINE DCE STUDENT AFFAIRS & STUDENT SERVICES OFFICE USE ONLY:					
STUDENT ID NUMBER		DISCOUNT CODE		DISCOUNT AMOUNT	
FIRST PAYMENT (CFP1-2 WI)		DATE RECEIVED		VERIFIED BY	
SECOND PAYMENT (CFP3-4 SP)		DATE RECEIVED		VERIFIED BY	
THIRD PAYMENT (CFP5-7 SU)		DATE RECEIVED		VERIFIED BY	