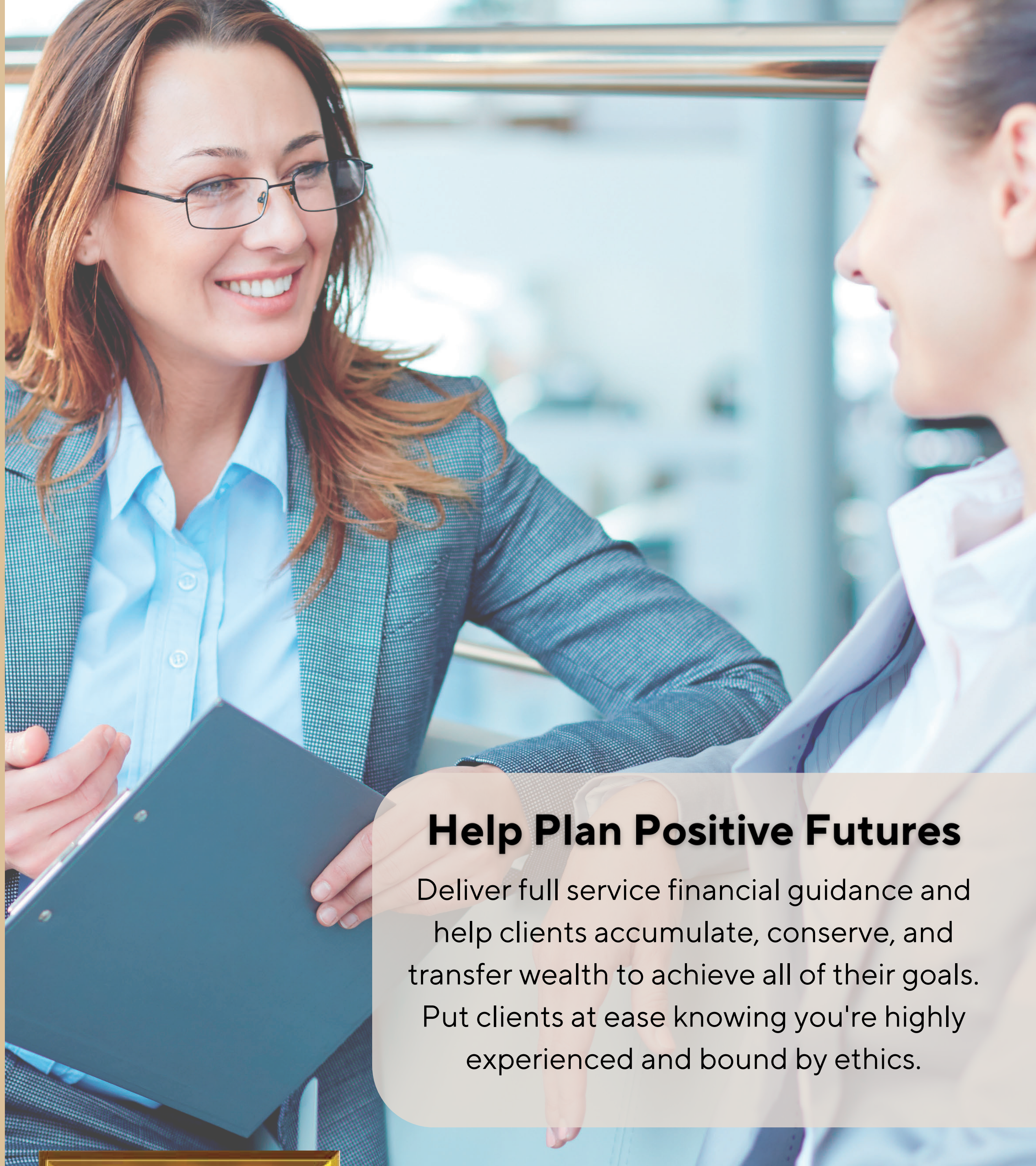
Certified Financial Planning



Help Plan Positive Futures

Deliver full service financial guidance and help clients accumulate, conserve, and transfer wealth to achieve all of their goals. Put clients at ease knowing you're highly experienced and bound by ethics.

CFP
CERTIFIED FINANCIAL PLANNER

Our CFP® Board registered program satisfies the educational requirements to earn the CFP® designation upon passing the exam.

- Introduction to Financial Planning
- Insurance Planning & Risk Management
- Investment Planning
- Tax Planning
- Estate Planning
- Employee Benefits & Retirement Planning
- Financial Planning Capstone

Bryant University partners with the Boston Institute of Finance to offer this program.

accelerator.bryant.edu
401-232-6200

Bryant University
INSPIRED TO EXCEL

WHY SHOULD YOU PURUSE A BRYANT UNIVERSITY CERTIFICATE

Bryant University fosters a career advancement mindset in which students learn in an interactive format to gain skills they can immediately apply for their professional development. Since 1863, Bryant University has been a leader in offering innovative educational programs that address the changing landscape of both business and society.

From Project Management to Six Sigma, People Analytics to Mastering Leadership, our programs utilize cutting-edge approaches to create a highly interactive and experiential learning environment and ensure the knowledge gained can be utilized right away. All programs are developed and supported by our renowned Bryant Faculty.

You choose the path that's right for you from the comfort of your home or office: virtual instructor-led or online self-paced.

EDUCATION FOR INDIVIDUALS

Advance your career through our professional certificate programs and individual courses. Bryant offers virtual instructor-led and self-directed online learning options to provide you the utmost flexibility and convenience in your lifelong learning journey.

CUSTOM PROGRAMS

Bryant University offers customizable training to corporations, non-profits, and government organizations. Our custom programs can be onsite, virtual instructor-led, or online self-paced.

Investing in employee professional development is an essential component for any organizational success. Working collaboratively, we develop customized corporate programs for employers to help increase retention, performance, and personal growth.

KEY

Instructor-Led (online)

INST.

Icon represents programs offered by instructors via Zoom.

Join our expert Bryant instructors for direct teaching via Zoom. Instructor-led courses provide excellent opportunities to network with fellow learners and engage in real-world applications of material.

Self-Paced (online)

SELF

Icon represents self-paced programs offered online.

All self-paced courses are designed and supported by Bryant instructors. Self-paced courses are ideal opportunities to fit learning and career development into your busy schedule.

Strategies for Success

SUCCESS

Icon represents customizable programs offered for organizations.

"Strategies for Success" is a one-week module that will familiarize you with our online learning system, to ensure when you begin your certificate program you are ready to learn and fully participate. Required for all first time Bryant University certificate learners.

DESIGN THINKING

Leverage your creativity: tackle complex problems by developing innovative solutions.

PROJECT MANAGEMENT

Explore the critical skills every project manager needs to be successful.

HUMAN RESOURCES

A SHRM preferred provider.

Examine HR best practices and become a strategic partner in your company's success.

LEADERSHIP DEVELOPMENT

Study the diverse skills required to be a dynamic value-based leader.

LEAN SIX SIGMA

Use a logical problem solving methodology to improve processes by eliminating waste.

COMING SOON

BUSINESS ANALYSIS

Advise clients and stakeholders by conducting insightful needs analyses.

AGILE & SCRUM

Deliver high quality efficient products and promote a strong team environment.

DIGITAL & SOCIAL MEDIA STRATEGY

Analyze today's digital landscape and build a strategic plan with target metrics.

DATA VISUALIZATION

Create vivid insightful visualizations in Excel, Power BI, Tableau, and Google Data Studio.

FINANCIAL PLANNING

Satisfy the educational requirements to confidently sit for the CFP® exam.

PA & NP LEADERSHIP IN HEALTHCARE

Master the skills PA/NP supervisors need in the healthcare workplace.

CYBERSECURITY FRAMEWORK

Learn NIST Cybersecurity Framework controls and management systems.

CERTIFIED FINANCIAL PLANNING

The program in Financial Planning provides the knowledge and expertise required to deliver full-service financial guidance designed with working professionals in mind. This comprehensive program provides the tools and information necessary to assist clients in accumulating, conserving, and transferring personal wealth to achieve their goals.

Our CFP® Board registered program satisfies the educational requirements to earn the CFP® designation upon passing the exam. Specific required courses are listed below.

The virtual classroom schedule is synced with each CFP® Board exam date to reduce the gap between study and exam taking. Minimizing this time gap ensures that the content remains
fresh which helps to improve testing outcomes. Upon program completion, a student will have time to take a review course to further improve his or her preparation for the upcoming exam.

Bryant University partners with the Boston Institute of Finance to offer this program. For more information about the Financial Planning program, please contact them at (800) 329-4996 or enrollment@bostonifi.com.

CERTIFIED FINANCIAL PLANNING

INTRODUCTION TO FINANCIAL PLANNING

INST. SELF

Earn 3.8 CEUs

Course Description

This course familiarizes students with the tools that will be used to complete future coursework. With this in mind, the introductory course focuses on the time value of money, accounting, statistics, and economics, while also providing a broad overview of the entire financial planning process. Topics from the Program's subsequent courses are introduced here and their place in the larger financial planning process is explained. Students entering the Online Program for Financial Planning are encouraged to start with this course.

Online Schedule

- 3 months to complete course
- 38 Learning Hours
- 3.8 CEUs

INSURANCE PLANNING AND RISK MANAGEMENT

INST. SELF

Earn 3.8 CEUs

Course Description

This course addresses life, disability, and medical insurance, including how insurance rates are developed, what types of contracts are available, how to read insurance proposals, and how life insurance is used in financial planning. Students learn about property and casualty insurance, including homeowners', liability, and auto insurance. Other topics include group life and health insurance plans.

Online Schedule

- 3 months to complete course
- 38 Learning Hours
- 3.8 CEUs

CERTIFIED FINANCIAL PLANNING

INVESTMENT PLANNING

INST. SELF

Earn 3.8 CEUs

Course Description

This course explores the securities market, sources of information, risk/return, debt and equities, stocks, bonds, options, futures, and security analysis, and culminates with learning portfolio construction and analysis. The course is designed to help students understand how money and capital markets operate, how to conduct investment and financial research, and how to evaluate the risks and rates of return for various types of investment vehicles.

Online Schedule

- 3 months to complete course
- 38 Learning Hours
- 3.8 CEUs

TAX PLANNING

INST. SELF

Earn 3.8 CEUs

Course Description

This course explores how state and Federal taxation impact different types of businesses, including sole proprietorships, partnerships and corporations. It provides students with an in-depth look at various tax-related aspects of investments, insurance, annuities, and securities. The course introduces students to other special tax considerations, including charitable giving, sale of assets, and more.

Online Schedule

- 3 months to complete course
- 38 Learning Hours
- 3.8 CEUs

CERTIFIED FINANCIAL PLANNING

EMPLOYEE BENEFITS AND RETIREMENT PLANNING

INST. SELF Earn 3.8 CEUs

Course Description

This course is taught in two sections. The retirement planning section covers tax-deferred retirement plans, IRAs, and nonqualified plans. The employee benefits section covers Social Security and Medicare, civil service, group life, disability, dental, and health insurance. Students also learn to plan, implement, and monitor individual and business-sponsored retirement plans. The course teaches how to perform retirement needs analysis, which regulatory issues surround retirement planning and benefits, and how tax issues impact these decisions.

Online Schedule

- 3 months to complete course
- 38 Learning Hours
- 3.8 CEUs

ESTATE PLANNING

INST. SELF Earn 3.8 CEUs

Course Description

This course addresses gift, estate, and generation-skipping transfer taxes, at the state and Federal levels. It covers planning techniques used to reduce tax impacts on transfers of wealth. It explores the effects of gifts and bequests, including the limitations on income shifting imposed by the Tax Reform Act of 1986. Non-tax aspects of estate planning, including the estate planning process, wills, trusts, durable powers of attorney, powers of appointment, and probate procedure are also studied.

Online Schedule

- 3 months to complete course
- 38 Learning Hours
- 3.8 CEUs

FINANCIAL PLANNING CAPSTONE COURSES

SELF

Earn 4.5 CEUs

Course Description

This competency-based course utilizes the knowledge obtained in the previous six financial planning courses to demonstrate a comprehensive understanding of financial planning theory through effective application in the creation and presentation of a financial plan for a client. Effective oral and written communication must be employed in conjunction with proper analytical techniques with the ultimate goal of crafting a plan that satisfies the client's goals and objectives within the framework of the economic, political, and regulatory environments. Utilization of the CFP Board Financial Planning Practice Standards is strongly emphasized.

Individuals that complete this course have proven their ability to apply the financial planning process to real life situations, as well as their ability to communicate their recommendations to a client in an efficient and professional manner.

Prerequisite

Students must complete courses FP401A–FP406A to begin FP407A unless the participant can prove Challenge Status as defined by CFP Board. Bachelor's Degree is highly recommended, and all students are encouraged to understand the CFP® Certification Requirements.

Online Schedule:

- 3 months to complete course
- 45 Learning Hours
- 4.5 CEUs

Certified Financial Planning			
Course	**Format**	**Fee**	**Note**
Introduction to Financial Planning	*Program offered in two formats. Single class pricing available.*		Bryant University partners with the Boston Institute of Finance to offer this program. For more information about the Certified Financial Planning program, please contact them at
Insurance Planning & Risk Management			
Investment Planning	Self-Paced Online	$ 2,995.00	
Tax Planning			**(800) 329-4996**
Retirement Planning & Employee Benefits			**enrollment@bostonifi.com**
Estate Planning	Instructor Led Online	$ 3,995.00	
Financial Planning Capstone			Click here for more information.