

**2007 PROGRAM DIRECTOR'S CONFERENCE
SEPTEMBER 7-8 2007
WASHINGTON STATE CONVENTION AND TRADE CENTER
SEATTLE, WASHINGTON**

SESSION: #977509

MARKETING YOUR PROGRAM

Presentation on best practices when marketing CFP Board-Registered Programs

FRIDAY, SEPTEMBER 7, 2007
1:40 PM – 2:20 PM

PRESENTER:

Mr. Jeff Lambert, CFP®
Lighthouse Financial Planning, LLC
101 Parkshore Drive, Suite 100
Folsom, CA 95630

Jeff has been Program Director and instructor for the UC Davis Extension, Personal Financial Planning Certificate Program since 1996. He is a full-time Fee-Only CFP® practitioner and managing member of Lighthouse Financial Planning, LLC with offices in Sacramento and Folsom, California.

He has 30 years of broad investment and financial industry experience. Jeff has been quoted in Money Magazine, Kiplinger's Personal Finance, the Sacramento Bee and Mutual funds magazine. He serves on the Accounting Advisory Board at American River College and on the Sacramento County Treasury Oversight committee, a group responsible for maintaining the integrity of 4.5 billion dollar investment funds for Sacramento county and local agencies.

He has served the profession's associations in many capacities both locally and nationally including president of the Sacramento Institute of Certified Financial Planners. He is a founding board member of the Financial Planning Association (FPA).

Jeff is co-author of the book, *The Ultimate Guide to Personal Finance for Entrepreneurs* published by Entrepreneur Press with Peter Sander published in 2007.

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| PRESENTER: | Dr. Stephen J. Larson, CFP®, Ph.D. Minnesota State University, Mankato Department of Finance 150 Morris Hall Mankato, MN 56001 |
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Stephen serves as an Assistant Professor of Finance at Minnesota State University, Mankato. He earned tenure at Eastern Illinois University before joining the faculty at Minnesota State Mankato in 2006. He teaches Personal Financial Planning, Risk and Insurance, and Estate Planning. He has published many articles in academic journals such as the *Financial Review* (2006), the *Journal of Financial Research* (2003), and *Global Finance Journal* (2001).

Stephen serves as the Program Director of Minnesota State's Financial Planning Certificate Program in the Twin Cities. He is also a leader in Minnesota State's Financial Planning Degree Program in Mankato, Minnesota. Stephen enjoys the academic life.

Marketing Our Program
Minnesota State University, Mankato
Stephen J. Larson, Ph.D., CFP®
Program Director
September 7, 2007

Outline

- About Me
- Overview of Our Program
- Marketing Our Program – 4 P’s
 - Product
 - Price
 - Place
 - Promotion
- Questions

About Me

- Assistant Professor @ MSU
- Tenured @ EIU
- Publications
- Teach FP Classes
- Corporate Experience
 - Insurance
 - Shipping

Overview of our Two Programs



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Marketing Our Program

The Four P's of Marketing:

1. **Product**
2. Price
3. Place
4. Promotion

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Product

“A Good Product Will Sell Itself”

- Do we cover all 89 topics effectively?
- Are the instructors qualified in their areas?
- Are the instructors effective communicators?
- Do our instructors like teaching our classes?
- Are the textbooks & materials student-friendly?
- Is our staff customer oriented?
- **Do our students pass the CFP® Exam?**

Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP, CERTIFIED FINANCIAL PLANNER™ and federally regulated CFP (with Bank & sign) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

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Price

- We remain competitively priced
- We negotiate in-house training
- We partner with Keir to offer a competitively priced live review course

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Place

- Four locations in the Twin Cities
- Comfortable classrooms
- Each location has a unique schedule
 - Bloomington: Weekend Program (4 weeks)
 - Minneapolis: Thursdays 3:00PM – 6:00PM (14 weeks)
 - Plymouth: Mondays 4:00PM – 7:00PM (14 weeks)
 - Saint Paul: Tuesdays 3:00PM - 7:00PM (11 weeks)

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Promotion

- Word of Mouth – “Experience Product”
- Target Marketing: Mailing Lists
- FPA Minneapolis Symposium
- FPA Monthly Meetings
- Ameriprise Case Competition
- Web site (Google search on Minnesota and CFP)
- Open House
- Pamphlets
- Advisory Board

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Future

Our graduates participate in managing America's wealth so we continually strive to improve our program.

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Questions?

Stephen J. Larson, Ph.D., CFP®
Program Director
September 7, 2007

Thank You!

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Marketing Your Program

J. Jeffrey Lambert, CFP®
Program Director
University of California Davis Extension
Personal Financial Planning Certificate



Target Market

- Those wanting to begin new career
 - Career changers
- Financial services employees
 - Career advancers
- Current financial planning practitioners



UC Davis PFP Marketing

- Institutional Marketing
- Program Unit Promotions
- Individual Contact
- Professional Involvement



Institutional Marketing

- Reputation
- Catalogue
- Emails
- Website



Program Unit Promotions

- Semi-Annual Info Session
- Direct Mail
- Advertising
- Public Service Announcements
- Campus



Individual Contact

- Financial Services Companies
- Financial Planning Practitioners
- Students



Professional Involvement

- FPA
- NAPFA
- Career Night
- How to Hire an Intern - Lunch



Telling Stories

“Your Story is Our Story”




Financial Planning Association

- Rashida Lilani, CFP® FPANC Board member
- The community for the financial planning profession
 - Award winning monthly journal
 - Local monthly meetings, Fri., 8-10 a.m.
 - National and online meetings
 - 10% Discount on classes



FPA Student Association

- Supported by FPA and PFP program
- Frequent meetings
- Students plan & run meetings
- No dues, no meeting fees
- Sign up in classes



Career Counseling/ Coaching

- Assessment
- Career Exploration
- Career Coaching



Contact Us

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Questions
and
Answers

