

Financial Plan Development Course Application

This application will be used to review the Financial Plan Development Course requirement. Along with this document, please include a copy of the syllabi, assessment rubric and curriculum vita. Should you have any questions, please contact us at education@CFPBoard.org or 202-379-2218.

SECTION I: Program Profile

Institution Name:

Program ID:

Program Title:

Address:

Program Phone Number:

Program E-mail:

SECTION II: Program Contact Information

Program Director/Program Head

Name:

Title:

Phone:

E-mail:

Program Contact (Individual listed in public information, including CFP Board's Web site listing of Registered Programs)

Name:

Title:

Phone:

E-mail:

Section III: Submission Instructions

Please submit completed application along with syllabi, course instructor curriculum vita and student assessment rubric to CFP Board by **December 1, 2011**. Materials may be sent by:

E-mail to education@CFPBoard.org

Fax to 202-379-2299

Mail to CFP Board, Education Department, 1425 K Street, NW, Suite 500, Washington, D.C. 20005

Please check the materials enclosed: Assessment Rubric Curriculum vita Syllabi

Has this course been approved at your institution? Yes No

Additional information and resources regarding the Financial Plan Development Course requirement are available at www.CFP.net/RegisteredPrograms. Should you have any questions about the course or require further assistance, please contact us at education@CFPBoard.org or 202-379-2218.

