

Financial Plan Development Course Initial 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(s): _____

Address: _____

Section II: Program Contact Information

Program Director: _____ Title: _____

Phone: _____ E-mail: _____

Course Instructor: _____ Title: _____

Section III: Course Information

Name of Course: _____ Delivery Method: Classroom Online

Has this course been approved at your institution? Yes No

Describe how the course meets or exceeds the minimum length (3 semester credits or its equivalent, 45 contact hours). Please provide a methodology used for determining the course length requirement based upon the CFP Board definition for contact hours located at <http://www.cfp.net/teamup/plandevdevelopmentcourse.asp#contacthours>. Attach additional documentation if needed.

Section IV: Submission Instructions

Please check the materials enclosed Assessment Rubric Curriculum vita Syllabi

Materials may be sent by:

E-mail: Education@CFPBoard.org

Fax: 202-379-2299

Mail: CFP Board, Education Department, 1425 K Street, NW, Suite 500, Washington, DC 20005

Please submit all required materials to CFP Board by **December 1, 2011**.

