



CERTIFIED FINANCIAL PLANNER (CFP) PROGRAM

at SOUTH SEATTLE COMMUNITY COLLEGE (in West Seattle)

Winter 2007 SCHEDULE

Information night on Thursday, January 4, 5:30-7:00 p.m.
www.LearnatSouth.org for more details & to register

CERTIFIED FINANCIAL PLANNER (CFP) PROGRAM

As an affiliate of the College for Financial Planning of Denver, Colorado, South Seattle Community College provides classroom instruction for those who are enrolled in the (self study) CFP Education Program. If you register with both programs there is a 20% discount on your curriculum materials.

The five-part (CFP I through V), 9-10-week courses compliment the self-study program by providing organization and structure to test preparation as well as instructor expertise and class discussion. In addition to classes, student study groups are often formed and meet on the SSCC campus.

Those participating in classroom instruction have considerably higher exam pass rates than those who self-study only. Completion of the five-part review program meets the educational requirements for the CFP certification.

Enrollment with the College for Financial Planning in Denver (1-800-237-9990) is required please contact SSCC before enrolling.

To Register or Questions, call SSCC at (206) 768-6782

or
lmotten@sccd.ctc.edu
 Instructor bios on the website.
www.LearnatSouth.org

South Seattle
 Community College
 6000 16th Ave. SW
 Seattle, WA 98106
 Attn: Continuing Ed.



CFP I - Financial Planning Process and Insurance

Item 1501 Thursday, 5:30 pm–8:30 pm January 18–March 22, 2007 Olympic Hall 206 \$250
 Study the overall financial planning process as well as the legal, ethical, and regulatory issues affecting financial planners. Time value of money concepts are also addressed. Discuss the principles of risk management and insurance to identify a client's risk exposure and select appropriate risk management techniques. Learn the basic insurance contract and practical insurance checklists. Course also covers life insurance needs and methods of determining the type (property, liability, home-owners, personal auto) and amount of insurance best suited to the client. Finally, medical and disability insurance, as well as long-term care insurance, are covered. (Karin Nilsson)

CFP II - Investment Planning

Item 1503 Tuesday, 5:30 pm–8:30 pm January 9–March 13, 2007 Olympic Hall 206 \$250
 Study the numerous investment vehicles that can be included in a client's personal investment portfolio, including stocks, bonds, mutual funds, insurance-based investments, futures, options, foreign investments, real estate, and tangible assets. Client assessment, tax considerations of investments, economic factors, risk and return analysis, valuation methods, asset allocation techniques, and portfolio performance evaluation methods are discussed. Finally, learn about portfolio construction and management. (Instructor: Bob Davis, CFP)

CFP III - Income Tax Planning

Item 1505 Offered in Spring 2007 \$250
 Study the fundamentals of individual income taxation, the tax implications of various types of businesses, planning for the acquisition and disposition of property, tax-advantaged investments, and tax planning for the family. More technical topics are also discussed, including employee compensation issues and planning, alternative minimum tax, self-employment tax, and tax traps. Tax research and practitioner concerns also are addressed. (Instructor: Michael Dill, CFP)

CFP IV – Retirement Planning/Employee Benefits

Item 1507 Wednesday, 5:30 pm-8:30 pm January 10–March 7, 2007 Olympic Hall 206 \$250
 Learn the personal tax-deferred retirement programs available to many working adults along with a framework for use in calculating the annual savings needed to reach retirement income goals. Learn key features of qualified retirement plan design, including the advantages/disadvantages of specific types of qualified plans for the owners of small- to medium-sized businesses, including a flowchart of the retirement plan development and maintenance process with funding considerations. Study government sponsored plans including Social Security and Medicare along with group life, health, and disability insurance, non-qualified deferred compensation, and other commonly provided employee benefits. (Instructor: Joan Stover, CFP) (no class 11/22)

CFP V - Estate Planning

Item 1509 Thursday 5:30 pm - 8:30 pm January 11–March 15, 2007 Olympic Hall 206 \$250
 Study the fundamentals of federal estate and gift taxation as well as specific exclusion and valuation techniques that reduce the size of the gross estate. Learn the characteristics of wills, intestacy, and the probate process along with trusts, property ownership forms, and will substitutes. (Instructor: Kathy Huckabay, CFP)

COMPREHENSIVE LIVE REVIEW

Item 1511 Mon–Sat, 8:00 am - 5:00 pm (until 12:00p.m. Sat) March 5–10 Olympic Hall 206 \$875 (\$100 discount for SSCC students who have taken CFP courses at South Seattle Community College.)

SSCC provides a Live Review prior to the CFP Board Exam. It is an intensive 6-day course. This classroom review course is designed to help all CFP certification exam candidates prepare for the two-day certification exam. (Instructors: Alfred Lee, Bob Davis, Michael Dill, and Joan Stover)

The program's instructors are industry professionals, all of whom are approved adjunct faculty of the College for Financial Planning.