



**SAN DIEGO STATE
UNIVERSITY**

**Preliminary Application
Executive Financial Planner Advance Certificate
San Diego State University**

Biographical and Contact Information

Full Legal Name:

Home Address:

Home Phone: () -

Cell Phone: () - Preferred Phone Number to Contact:

Work Phone: () -

Email Address:

Country of Citizenship:

If not USA citizen, visa status:

Academic History

BA / BS Degree (required) Yes: No: Estimate your GPA:

School Attended:

Field / Major: Year Graduated:

MA / MS Degree Yes: No:

School Attended:

Field / Major: GRE / GMAT Score (if taken) :

Have you ever applied to or attended SDSU as a degree seeking student? Yes: No:

Experience Qualification

Which experience admission criteria have you met?

Financial Services Experience (18 months minimum with client contact, 36 months without)

Years in Financial Services Industry:

Employer:

Professional Experience

CPA Licensee Yes: No:

CFA Charter holder Yes: No:

Licensed Attorney Yes: No:

Corporate Finance or Accounting (5 years of experience minimum)

Current Employer:

Years with Current Employer:

Previous Employer:

Years with Previous Employer:

Bachelor's or Master's Degree in a business field with 5 years at management level or other relevant experience.

Management-level Position:

Current Employer:

Years of Experience:

US Military Experience (O-4 and above or substantial leadership experience)

Prerequisite Courses

There are no prerequisites to the Executive Financial Planner Program. That material is integrated into the Executive classes. However, we have an interest in your academic background. There are additional prerequisites for the master's program, which will be evaluated if you seek admission to the Master's program.

Have you ever had any college credit courses in . . . ?

Financial Accounting Yes: No: Where:

Economics Yes: No: Where:

Business Law Yes: No: Where:

Statistics Yes: No: Where:

An upper division or graduate class in:

Basic Finance Yes: No: Where:

Referral

I was referred to this program by:

Fitness Standards

- I meet the Certified Financial Planner Board of Standards, Inc's fitness standards.**
(<http://www.cfp.net/become-a-cfp-professional/cfp-certification-requirements/ethics-requirement/fitness-standards>)

Please confirm

My signature below indicates the information I have provided is accurate. Misleading statements are grounds for removal from the program or withdrawal of the Certificate. I also indicate that I understand that this is a preliminary application. The actual admission decision is made by the SDSU Graduate Division and will be based upon my application to the University using "CSU Mentor" on-line at <http://www.csumentor.edu/>. I understand my preliminary acceptance to the program allows me to take up to 3 units of classes before the beginning of the semester in which I am officially accepted. You are encouraged to file your official application as soon as practical after you receive preliminary acceptance.

Signature:

Date:

Please submit your application by email or mail to:

E-mail: tom.warschauer@sdsu.edu

Fax: (619) 594-3272

Mail: Tom Warschauer, Program Director
Department of Finance
Student Services East 3401
San Diego State University
5500 Campanile Drive
San Diego, CA, 92182-8236