

**APPLICATION FORM
SDSU CERTIFICATE IN PERSONAL FINANCIAL PLANNING**



Name (as desired on Certificate) _____

Name (Official SDSU name, if different) _____

Address _____ SDSU Red ID _____

_____ Birth Date (month/day only) _____

Please check one: BSBA Degree ___ MS Degree ___ Other ___ Non-Matriculated ___

Semester Last Required Class Taken _____ Last 4 digits of your Social Security¹ # _____

Email _____ Phone _____ CFP Board Reg.^{1,2} # _____

Unofficial transcripts must be attached to this application showing that you have successfully completed each of the following upper division classes (and prerequisite lower division classes, if you were not a business major at SDSU). *Please highlight* the upper division classes on the transcripts. A “B-” (2.7) overall average in courses listed below as “Required Courses” is necessary. Applications are processed three times a year in the first week of September, January, and the fourth week in May. Application deadlines for the upcoming CFP® Certification exams are available on CFP Board’s website: <http://www.cfp.net/become>). Submit application to Tom Warschauer, Program Director, in Room SSE3401 or in the Finance Department Office. We will report your completion to the CFP Board.

Do you plan on taking the certification exam? ___yes, if so, when? _____ or ___no

REQUIRED COURSES:

Prerequisites

Have you completed all required prerequisites: Legal Environment, Financial Accounting Fundamentals, Principles of Econ (macro & micro), and Statistics? Yes _____ No _____

<u>Please Circle Appropriate Course</u>			<u>Semester</u>	<u>Grade³</u>
Acct. 503	Acct. 503	Fed Taxation of Individuals	_____	_____
Finance 323	Bus. Ad . 625	Fund of Finance	_____	_____
Finance 327	Finance 651	Investments	_____	_____
Finance 421or 427	[Finance 652or 642] ⁴	Portfolio Mgt. or Derivatives/ Financial Risk Mgt.	_____	_____
Finance 585	Finance 585	Estate Planning	_____	_____
Finance 522	Finance 522	Individual Insurance Mgt.	_____	_____
Finance 589	Finance 589 or 657	Personal Financial Planning/ Financial Counseling	_____	_____
Finance 590	Finance 590 ³	Financial Planning Practicum	_____	_____

I certify that the above information is accurate: _____⁵
(signature) (date) rev5/15

¹ If you do not desire us to report this information to the CFP Board, leave blank.
² You can get this number at <https://www.cfp.net/secure/DynamicPage.aspx?site=secure&webcode=ExamAddInd&action=add>
³ A grade point average of 2.7 in these courses is required to earn this certificate.
⁴ These classes are strongly recommended for graduate students, but not required.
⁵ This is an official document. Misrepresentation of any material fact is reason for permanently withholding or withdrawing the Certificate.