

## Interested in becoming a CERTIFIED FINANCIAL PLANNER™?

### Accelerated 12-Month Course of Study Offered in Chicago Through Northwestern University's CFP® Certification Program

Northwestern University's Financial Planning Program, registered with the Certified Financial Planner Board of Standards, is a seven-module course of study offered with The BOE Institute, LLC. The program fulfills the educational requirement for candidates seeking the CERTIFIED FINANCIAL PLANNER™ certification.

#### Accelerated Course

The modules will be taught on an accelerated basis, allowing course completion in twelve months. Students in this September 2010 cohort will finish their coursework in August 2011, and will be prepared to take the November 2011 CFP certification examination. Classes will meet one Friday-Saturday (9:00 AM to 5:00 PM) each month at the Northwestern loop campus.

#### Homework, Attendance and Testing

There will be an assigned textbook, supplemental readings, sample exam questions and financial planning exercises for each module. Significant study time will be expected between the in-person class sessions. Students are encouraged to attend all sessions. Quizzes and examinations for each module are administered online. A grade of "C" (a score of 70% or higher) will be required to pass each module.

**Acclaimed Instructors:** All of the program instructors are highly qualified practitioners with significant classroom experience, practical knowledge and industry volunteer activities. Scheduled instructors for modules include: Craig LeBouef, MBA, CPA/PFS, CFP®; Mark Wilson, APA, CFP®; Dick Potter, CLU, ChFC, MBA, CFP®; and Gary Englund, JD, CFP®, CLU, ChFC, AEP, MSFS, RHU, REBC.

#### The accelerated program includes:

- ◆ 24 days of in-person instruction from highly qualified professionals
- ◆ Required textbooks, supplemental materials and practice questions for each module
- ◆ "Learning the HP 12C Financial Calculator" training supplement
- ◆ Completion of a comprehensive financial plan
- ◆ Online e-learning resources available 24/7 from anywhere
- ◆ Hands-on use of industry-leading financial planning and investment management software

The total cost of the program is \$5,775, which includes all textbooks and other resources shown above. Tuition is \$775 for the first module, \$900 each for modules 2-6 and \$500 for the Case Study module. Students paying for the entire program at the outset will receive a \$400 discount (total price of \$5,375). Other discounts will be offered to members of industry and professional associations, including FPA, NAIIFA, CPA, Bar and Estate Planning Councils. A deposit of \$250 is required to register for the first module. Upon registering, students will receive an online copy of the "Learning the HP 12C Financial Calculator" course. Demonstrating proficiency with the financial calculator is required to successfully complete the first module.

To register for this Chicago Northwestern program, or for additional information about the BOE Institute, visit [www.boeinstitute.com](http://www.boeinstitute.com). Or, contact Gary Englund: [gary@boeinstitute.com](mailto:gary@boeinstitute.com) or 888-898-3071.

#### The Chicago September 2010 schedule is:

September 10-11, 2010  
Financial Planning Process and  
the HP 12C Calculator  
October 15-16 and November 19-20  
Insurance Planning  
December 10-11 and January 7-8, 2011  
Income Tax Planning  
February 4-5 and March 4-5  
Investment Planning  
April 8-9 and May 6-7  
Retirement Planning  
June 10-11 and July 8-9  
Estate Planning  
August 5-6  
Case Study Preparation