

Take the First Step to Becoming a Certified Financial Planner™



If you have a bachelor's degree and two or more years of experience in the fields of financial services, finance, law, or accounting and are considering a career as a financial planning professional, San Diego State University offers a convenient path.

Student Testimonial

"The program provided me with an opportunity to get an amazing education and designation, while I still could produce at my current employment."

— Adam Shaw

The SDSU Executive Financial Planner Advanced Certificate is a CFP Board-registered, 18-unit program that prepares you to sit for the Certified Financial Planner™ exam. The six-course program is offered through the AACSB-accredited SDSU Fowler College of Business.

The Executive Financial Planner Advanced Certificate is Ideal for:

- Financial services firm employees with client experience
- Attorneys, CPAs, Enrolled Agents, and CFAs
- Accountants and financial professionals
- Those with an advanced degree in business
- Students pursuing a Master of Science degree in Financial and Tax Planning (certificate units are transferrable).

How to Apply

Visit SDSU's Personal Financial Planning website at sdsu.edu/finplan, select Executive Financial Planner, and download the application form. Send the completed application form to Program Director Thomas Warschauer, Ph.D., CFP®, at tom.warschauer@sdsu.edu before the next class.

To earn an advanced certificate or master's degree, you must apply and be admitted to SDSU. For more information, please contact the Division of Graduate Affairs at gra@sdsu.edu, visit <https://admissions.sdsu.edu/graduate/> or call (619) 594-5213.

The program is administered through the SDSU College of Extended Studies. Learn more at neverstoplearning.net/financial.



SAN DIEGO STATE
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College of
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never stop learningSM

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