

ONLINE FINANCIAL PLANNER PROGRAM

More than the Typical CFP® Program

The University of Texas – San Antonio Online CFP® Certification Education Program represents a unique partnership between a nationally-recognized business school and a training firm specializing in the wealth management and financial services marketplace. The result is a program with the highest level of educational integrity and the actionable application strategies that will enhance the career of any financial advisor.

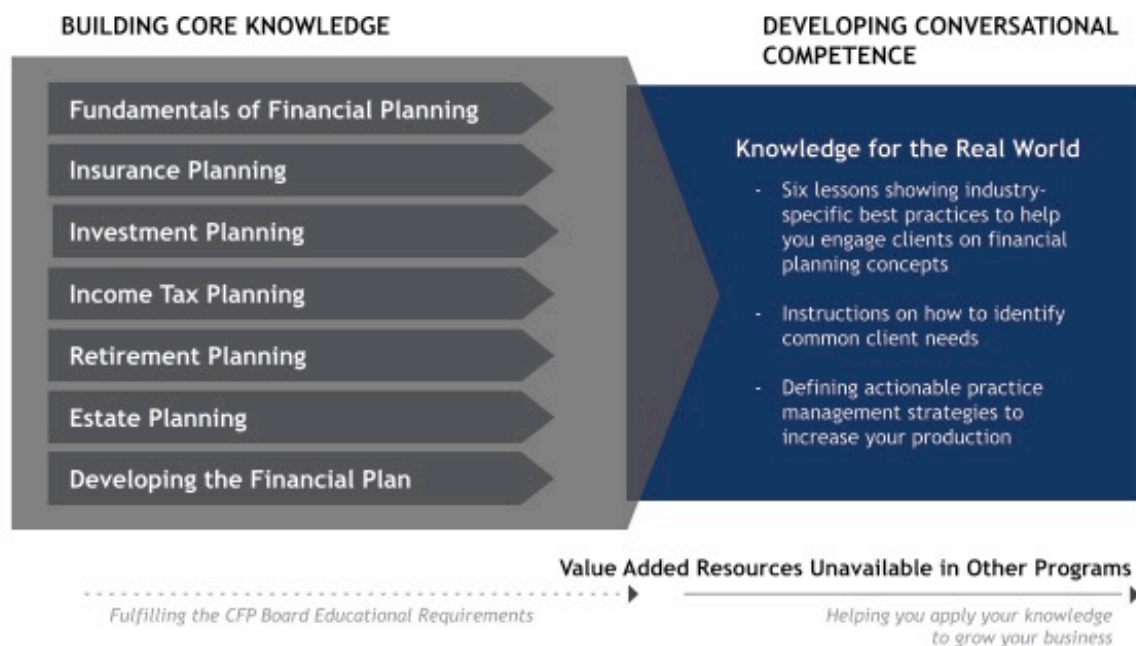
Meet the Educational Requirements for CFP® Certification

Upon completion of the program, students will be issued a Certificate of Completion from the University of Texas – San Antonio – a premiere educational institution – and will be eligible to sit for the prestigious CFP Board Exam.

What sets this program apart?

WORK AS YOUR SCHEDULE PERMITS - With online delivery, the content is available whenever you are. You set the pace and schedule based on your priorities and preferences. Some have completed the program in as little as 4 months!

BRIDGING THE GAP BETWEEN KNOWLEDGE AND EDUCATION - Knowing that participants need both technical knowledge AND the skills to apply that knowledge with clients, this program has two specific components, each one meeting a critical objective.



A primary requirement for obtaining your CFP® certification is the educational program. The Online Financial Planner Program at UTSA delivers an extensive series of online lessons covering the core topics of financial planning.

The program includes:

- > Courses and all interactive Lessons
- > Lessons are both printable and mobile
- > Assigned Program Mentor
- > Study Guides for each Lesson

An included aspect of our program is the industry-unique “Knowledge for the Real World” series. These additional lessons provide industry-specific insights and best practices from top producers regarding how you can use the technical knowledge you acquire in the CFP® program and apply it with clients.

When completed after obtaining your CFP® certification, these fulfill over 90% of your first two years of Continuing Education requirements.

HIGHEST EDUCATIONAL STANDARDS – The combination of The University of Texas – San Antonio as a premier educational institution and Greene Consulting’s three-plus decades of financial services training experience delivers the most powerful preparation available for achieving your CFP® certification.

ENGAGING– Some online programs are nothing more than PDF documents of the textbook content. Our program delivers truly interactive and engaging content. Using real-life case studies, review exercises, flash presentations and other forms of interaction increases your learning and consistently reinforces key concepts.

ACCESS TO INSTRUCTORS – Online programs can often seem too distant. With this program, you can email questions from any page in the content. Answers and detailed feedback are provided within 24 hours.

PASS RATES – With a pass rate of over 70%, this program has proven successful in preparing students for obtaining their CFP® certification.

CUSTOMER SERVICE – Our students are not simply just a name or number. We will never take your participation in our program for granted and will do anything we can to make your experience in this program the best it can possibly be.

How to Enroll

1. Go to the Online Executive Program for Financial Planning website at: utsa.financialplannerprogram.com
2. Click “Enroll”.
3. Complete the registration form and enter your credit card for secure online payment.

You will immediately receive access to the entire program and can begin preparing for obtaining your CFP® certification.
