



CERTIFIED FINANCIAL PLANNER OVERALL CERTIFICATE FORM

Submit this form in person or by mail to: UT Arlington Continuing Education 140 W. Mitchell, Arlington, TX 76019 M: 817-272-2581 cedregistration@uta.edu

Status of Processing: Certificate request forms will be processed within ten business days of receipt. If you do not receive a receipt of confirmation within this time frame, contact our office at 817-272-2581. All certificates will be sent via email and shipped via USPS.

Application Information: Students must complete all program requirements prior to submitting this application. Students will be provided with both a paper and a PDF copy of the certificate of completion.

STUDENT INFORMATION

Last Name _____ First Name _____

Mailing Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

CERTIFICATE REQUIREMENTS (7 Courses)

_____ Course 511: General Financial Planning Principles

_____ Course 512: Risk Management, Insurance and Employee Benefits Planning

_____ Course 513: Investment Planning

_____ Course 514: Tax Planning

_____ Course 515: Retirement Savings and Income Planning

_____ Course 516: Estate Planning

_____ Course 517: Capstone: Financial Plan Development



FEE & PAYMENT

Item	Price
Application Fee: Includes paper and PDF certificate	\$50.00

Charge To:

Visa Master Card Discover American Express

Card Number: _____

Expiration: _____

Authorized Signature: _____

OFFICE USE ONLY

Processed	Date	Completed By
Received		
Payment Received		
Reviewed		
Mediation Practicum Records Received		
Certificate Emailed		
Certificate Mailed		

Notes: