



**Bryant & Stratton College**

**Online Training that Works**

Taking training to provide you the personal edge and get ahead in your career has never been easier. Our self paced courses are flexible and cost effective, giving you the freedom to take the courses around your busy schedule in the comfort of your home or office

**Program Features**

- E learning courses developed by KESDEE, the worlds largest financial e learning company
- Courses are accepted for CE credits by CFP®
- CFP's can earn 6 CE credits

**Enroll Now: For more information on our online certificates visit us at <http://certificate.bryantstratton.edu>**

**System Requirements**

Browser Netscape Communicator 4.0 or Browser AOL 4.0 ,or Operating System Mac OS 8.5 or Browser Microsoft Internet Explorer 4.0. Some courses may have additional requirements

# Essentials of Financial Planning

**Overview**

Are you new to the financial services industry and will be working with the needs of clients to help them better manage their portfolio? Are you looking to personally understand your own financial portfolio so you can build a stronger personal financial future? These courses are designed as primers to enhance your knowledge in financial planning and could be the key to future decision and overall financial success. Designed by KESDEE, the worlds largest financial e-learning company, Certified Financial Planners can earn CE credits for the CFP®.

**Learners who complete these courses:**

1. Understand the product choices available for investment, features of investment products and the difference between various investment products
2. Explain the various financial goals, investment objectives and investment constraints the need to be considered while making financial decisions
3. Understand the meaning and process of financial planning and the basic steps in the financial planning process
4. Help understand the building blocks of a model portfolio
5. Understand the psychographics of an investor and a better appreciation for various investor profiles



Essentials of  
Financial Planning  
**\$299**

**Courses in package**

- Financial Products for Investors
- Goals and Investment Objectives
- Introduction to Financial Planning
- Model Portfolio
- Tax Planning
- The Psychographics and Life Cycle of the Investor