FINANCIAL PLANNING EDUCATION CENTER
SUMMER/FALL 2021 PROGRAMS AND COURSES

FINANCIAL PLANNING CERTIFICATE PROGRAM

All registrations are due seven calendar days before the course start date. Any registration submitted after that deadline will be charged a mandatory $75 late registration fee.

You will receive confirmation of your registration by email. If you need confirmation or a receipt mailed to you, contact our office at (312) 362-6300 or cperegistration@depaul.edu. Written notification of cancellation is required seven calendar days before the course start date to receive a full refund (minus a $75 cancellation fee).

DePaul’s complete registration and student policies can be found on our website at cpe.depaul.edu. We reserve the right to substitute instructors, change the day and location that programs meet, and cancel programs due to insufficient enrollment or unforeseen events.

WAYS TO REGISTER

Online: cpe.depaul.edu/fpec

Mail in: DePaul University, CPE 1 East Jackson Boulevard Chicago, Illinois 60604-2287

Call: (312) 362-6300

CONTINUING AND PROFESSIONAL EDUCATION REGISTRATION FORM

Name
Date of Birth

Home Address
City State Zip

Home Phone
Home Email

Employer
Title

Business Address
City State Zip

Business Phone
Business Email Fax

Preferred mailing address: □ Home □ Business
Preferred email address: □ Home □ Business

How did you hear about us: □ Email □ Advertisement □ Mailing
□ Internet Search □ Word of Mouth □ Employer
□ Event □ Professional Organization/Association
□ Social Media □ Other

Highest level of education: □ High School/GED □ Bachelor’s Degree □ Professional Degree
□ Associate Degree □ Master’s Degree □ Doctoral Degree
□ Other

School previously attended:

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<table>
<thead>
<tr>
<th>Dates</th>
<th>Days</th>
<th>Campus</th>
<th>Times</th>
<th>Duration</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Module 1: Fundamentals of Financial Planning and Insurance Planning</td>
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<tr>
<td>07/07/2021-09/15/2021</td>
<td>Wednesdays</td>
<td>Online</td>
<td>6 – 9:30 p.m.</td>
<td>11 weeks</td>
<td>$900</td>
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<tr>
<td>09/27/2021-12/13/2021</td>
<td>-</td>
<td>Online</td>
<td>24-hour access</td>
<td>11 weeks</td>
<td>$900</td>
</tr>
<tr>
<td>09/29/2021-12/15/2021*</td>
<td>Wednesdays</td>
<td>Loop</td>
<td>6 – 9:30 p.m.</td>
<td>11 weeks</td>
<td>$900</td>
</tr>
</tbody>
</table>

| Module 2: Investment Planning |
| 07/06/2021-09/14/2021 | Tuesdays | Online | 6 – 9:30 p.m. | 11 weeks | $900 |
| 09/28/2021-12/14/2021* | Tuesdays | Loop | 6 – 9:30 p.m. | 11 weeks | $900 |

| Module 3: Income Tax Planning |
| 07/06/2021-09/14/2021 | Tuesdays | Online | 6 – 9:30 p.m. | 11 weeks | $900 |
| 09/27/2021-12/13/2021 | - | Online | 24-hour access | 11 weeks | $900 |
| 09/30/2021-12/16/2021* | Thursdays | Loop | 6 – 9:30 p.m. | 11 weeks | $900 |

*Holiday: No class the week of Thanksgiving.
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Module 4: Retirement Planning and Employee Benefits
- 07/07/2021-09/15/2021 Wednesdays Online 6 – 9:30 p.m. 11 weeks $900
- 09/29/2021-12/15/2021 Wednesdays Online 6 – 9:30 p.m. 11 weeks $900

Module 5: Estate Planning
- 07/08/2021-09/16/2021 Thursdays Online 6 – 9:30 p.m. 11 weeks $900
- 09/27/2021-12/13/2021 Online 24-hour access 11 weeks $900

Module 6: Financial Plan Development
- 09/27/2021-12/13/2021 Mondays Online 6 – 9:30 p.m. 11 weeks $900

*Holiday. No class the week of Thanksgiving.

PAYMENT OPTIONS
If you are submitting this registration form by mail, you may include a check for payment. Please note, it may take 3-4 weeks to process payment by check and officially register you for your selected course or program. If you plan to register online at cpe.depaul.edu, you will need to create an account to complete both registration and payment. Online payments can be made with credit or debit card only. A university-wide transaction fee of $0.30 + 2.3% of the total payment amount is added when paying with credit or debit card online.

PAYMENT DEFERRAL
Completed payment deferral forms must accompany registrations. To request forms, please contact our office at (312) 362-6300 or cperegistration@depaul.edu.

Note: Your registration will not be processed without your signature below.

I am aware that a bachelor’s degree and three years of relevant experience in the financial planning industry are required by the CFP Board in order to obtain the CFP® certification. I have also reviewed and accepted the registration and payment policies listed on this page.

Signature

PAYMENT
Payment may be made by check, VISA, Master Card, Discover, American Express or money order. Cash will not be accepted. Payment must be received at the time of registration. Checks should be made payable to DePaul University SCPS and reference the student’s name. University policy requires a $25 Non-Sufficient Funds (NSF) fee to be charged for all returned checks.

CAMPUS LOCATIONS
Loop Campus
1 East Jackson Blvd.
Chicago, IL 60604
(312) 362-6300

FOR MORE INFORMATION:
For questions regarding the Financial Planning Education Center, contact:
CPE Registration
(312) 362-6300
cperegistration@depaul.edu

For information about these and other DePaul CPE courses, visit our website at cpe.depaul.edu.