

# CONTINUING AND PROFESSIONAL EDUCATION REGISTRATION FORM

DePaul University

## FINANCIAL PLANNING EDUCATION CENTER SUMMER/FALL 2021 PROGRAMS AND COURSES

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:	<input type="checkbox"/> Home	<input type="checkbox"/> Business		
Preferred email address:	<input type="checkbox"/> Home	<input type="checkbox"/> Business		
How did you hear about us:	<input type="checkbox"/> Email	<input type="checkbox"/> Advertisement	<input type="checkbox"/> Mailing	
	<input type="checkbox"/> Internet Search	<input type="checkbox"/> Word of Mouth	<input type="checkbox"/> Employer	
	<input type="checkbox"/> Event	<input type="checkbox"/> Professional Organization/Association		
	<input type="checkbox"/> Social Media	<input type="checkbox"/> Other _____		
	Highest level of education:			
	<input type="checkbox"/> High School/GED	<input type="checkbox"/> Bachelor's Degree	<input type="checkbox"/> Professional Degree	
	<input type="checkbox"/> Associate Degree	<input type="checkbox"/> Master's Degree	<input type="checkbox"/> Doctoral Degree	
	<input type="checkbox"/> Other _____			

School previously attended: \_\_\_\_\_

### 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

## FINANCIAL PLANNING CERTIFICATE PROGRAM

Dates	Days	Campus	Times	Duration	Cost
<b>Module 1: Fundamentals of Financial Planning and Insurance Planning</b>					
<input type="checkbox"/> 07/07/2021-09/15/2021	Wednesdays	Online	6 – 9:30 p.m.	11 weeks	\$900
<input type="checkbox"/> 09/27/2021-12/13/2021	-	Online	24-hour access	11 weeks	\$900
<input type="checkbox"/> 09/29/2021-12/15/2021*	Wednesdays	Loop	6 – 9:30 p.m.	11 weeks	\$900
<b>Module 2: Investment Planning</b>					
<input type="checkbox"/> 07/06/2021-09/14/2021	Tuesdays	Online	6 - 9:30 p.m.	11 weeks	\$900
<input type="checkbox"/> 09/28/2021-12/14/2021*	Tuesdays	Loop	6 – 9:30 p.m.	11 weeks	\$900
<b>Module 3: Income Tax Planning</b>					
<input type="checkbox"/> 07/06/2021-09/14/2021	Tuesdays	Online	6 – 9:30 p.m.	11 weeks	\$900
<input type="checkbox"/> 09/27/2021-12/13/2021	-	Online	24-hour access	11 weeks	\$900
<input type="checkbox"/> 09/30/2021-12/16/2021*	Thursdays	Loop	6 – 9:30 p.m.	11 weeks	\$900

\*Holiday. No class the week of Thanksgiving.

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 cpereregistration@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.

## FINANCIAL PLANNING CERTIFICATE PROGRAM (Continued)

Dates	Days	Campus	Times	Duration	Cost
<b>Module 4: Retirement Planning and Employee Benefits</b>					
<input type="checkbox"/> 07/07/2021-09/15/2021	Wednesdays	Online	6 – 9:30 p.m.	11 weeks	\$900
<input type="checkbox"/> 09/29/2021-12/15/2021*	Wednesdays	Online	6 – 9:30 p.m.	11 weeks	\$900
<b>Module 5: Estate Planning</b>					
<input type="checkbox"/> 07/08/2021-09/16/2021	Thursdays	Online	6 - 9:30 p.m.	11 weeks	\$900
<input type="checkbox"/> 09/27/2021-12/13/2021	-	Online	24-hour access	11 weeks	\$900
<b>Module 6: Financial Plan Development</b>					
<input type="checkbox"/> 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](http://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 \$.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](mailto: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 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](mailto:cperegistration@depaul.edu)

For information about these and other DePaul CPE courses, visit our website at [cpe.depaul.edu](http://cpe.depaul.edu).