



College for Financial Planning®

EDUCATING THE NATION'S TOP FINANCIAL ADVISORS

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Q Describe your firm, its offerings and its mission.

The College for Financial Planning (www.cffpinfo.com) is the leading, Regionally Accredited institution of Higher Education focused on meeting the education needs of financial services professionals. Founded in 1972, the College created the prestigious CERTIFIED FINANCIAL PLANNER™ (CFP®) certification and has trained over 120,000 professionals. Graduates of the College are consistently ranked as the best financial advisers in the nation. Designations awarded include AAMS®, AWMA®, CRPC®, CRPS®, CMFC®, RP®, and three different graduate degrees.

Q Describe how your investment products fit into a well-rounded asset allocation strategy.

The Accredited Wealth Management AdvisorSM or AWMA® Program allows you to examine the entire asset management process via real client situations and models defining useful planning techniques. Case studies and a client-centered, problem-solving method provide a hands-on approach to the material.

The Accredited Portfolio Management Advisor or APMASM Program provides an introduction to portfolio construction and management. Topics covered will include client assessment and suitability, risk/return, investment objectives, bond and equity portfolios, modern portfolio theory, investor psychology, and other topics germane to building appropriate client portfolios.

Q How has your firm adapted during the recent economic downturn?

As an education provider, we found that our customers (Financial Professionals) recognized that keeping a current and relevant skill set is critical to surviving (even flourishing in) an economic downturn. In recognition of difficult times, The College for Financial Planning froze tuition in 2010 (maintained 2009 tuition) and increased special pricing and promotions to advise firms and organizations.

AT A GLANCE

Firm name: College for Financial Planning

Principals:

- John Sears – President
- Dr. Jesse B. Arman - Vice President, Academic Affairs | Associate Professor
- Dirk Pantone - Vice President, Business Development
- Ginger E. Current - Vice President of Operations
- Karoline Mello - Vice President, Technology and Finance

Employees: 75

Location: Greenwood Village, CO

Years in business: 39