

**APPLICATION FORM  
SDSU CERTIFICATE IN PERSONAL FINANCIAL PLANNING**



SAN DIEGO STATE  
UNIVERSITY

Name (on Certificate) \_\_\_\_\_

Address \_\_\_\_\_ Red ID # \_\_\_\_\_

Regular degree student? Yes \_\_\_\_\_ No \_\_\_\_\_ Semester Last Required Class Taken \_\_\_\_\_

Email \_\_\_\_\_ Phone \_\_\_\_\_

*Unofficial transcripts must be attached* to this application showing that you have successfully completed each of the following upper division classes (and prerequisite lower division classes, if you were not a business major at SDSU). *Please highlight* the upper division classes on the transcripts. A “B-” (2.7) overall average in courses listed below as “Required Courses” is necessary. Applications are processed three times a year on September 10<sup>th</sup>, December 31<sup>st</sup>, and May 22<sup>nd</sup>. Application deadlines for the upcoming CFP® Certification exams are Oct 8, 2008 and in February and June of 2009, confirm on CFP Board’s website: <http://www.cfp.net/become>). Submit application to Tom Warschauer, Program Director, in Room BA 312 or in the Finance Department Office.

**PREREQUISITES:**

<b>Course Dept. &amp; Number</b>	<b>Graduate Alternative</b>	<b>Title</b>	<b>√ if Taken</b>
Finance 140	Finance 604	Bus. Law	_____
Acct. 201	BA 600	Finl Acctg	_____
Economics 101	Economics 603	Prin of Econ Macro	_____
Economics 102	Economics 603	Prin of Econ Micro	_____
Stat 119	BA 652	Elem Statistics	_____

**REQUIRED COURSES:**

<b><u>Please Circle Appropriate Course</u></b>			<b><u>Grade<sup>1</sup></u></b>
Acct. 503	Acct. 503	Fed Taxation of Individuals	_____
Finance 323	Bus. Ad 665	Fund of Finance	_____
Finance 327	Finance 651	Investments	_____
Finance 421	[Finance 652] <sup>2</sup>	Portfolio Man	_____
Finance 445	Finance 705	Estate Planning	_____
Finance 522	Finance 522	Individual Insurance Mgt.	_____
Finance 523	Finance 523	Employee Benefit Planning	_____
Finance 589	Finance 657	Personal Financial Planning/ Financial Counseling	_____
Finance 590 <sup>3</sup>	Finance 590 <sup>3</sup>	Financial Planning Practicum	_____

I certify that the above information is accurate: \_\_\_\_\_<sup>4</sup>  
(signature) (date) rev 2/08

<sup>1</sup> A grade point average of 2.7 in these courses is required to earn this certificate.

<sup>2</sup> Finance 652 is strongly recommended for graduate students, but not required.

<sup>3</sup> Pending University Approval, until approved a one unit 498/798 will be provided.

<sup>4</sup> This is an official document. Misrepresentation of any material fact is reason for permanently withholding or withdrawing the Certificate.