Financial Planning Certificate Program

Our new online program began in January 2009. We are excited to report that the interest has been steadily increasing.

We began the program so that we can effectively deliver CFP® Board’s eighty-nine topics to Minnesotans (and others) who cannot easily travel to take our popular classroom based classes. Each of our five online classes will run for nine weeks enabling students to complete their course work in just one year. Our program will be somewhat flexible in that students will be able to choose a convenient time during the week to do their class work. This should help working parents and others juggle studying and other commitments.

Each week our experienced instructors will guide students through the challenging material via narrated PowerPoint slides that students can download at any time. Students will subsequently download homework problems to help them master the material by “doing.” Our instructors will be available online via “office hours,” which will be delivered in a scheduled online chat environment. Also, students will be able to communicate with their instructors via email. In order to keep our online students on track, there will be scheduled weekly quizzes (due Saturday evenings) and two scheduled exams. Our number one priority is to reach as many financial planners as possible giving Minnesotans greater access to holders of the well-respected CFP® designation.

Information on the online program can be found at: http://www.mnsu.edu/cfp/online.html

The online courses can be mixed and matched with the classroom based program if you are interested in taking courses online.

Location Updates

We are on the move...

Plymouth/Monday:
Beginning with CFIN 201 on July 27, 2009 Plymouth courses will be held at the Radisson Hotel and Conference Center, 3131 Campus Drive, Plymouth, MN

Bloomington/Weekend:
Beginning with CFIN 201 on September 11, 2009 weekend courses will be held at Minnesota State University, Mankato @ 7700 France, 7700 France Ave S, Edina, MN

The Minneapolis and Saint Paul courses will remain at their current locations.

If you have questions about this, please contact Jean Clarke
Symposium 2009: Planning For Success  
October 21-22  Minneapolis Convention Center

Mark your calendars now for the Financial Planning Association Symposium, October 21 and 22 at the Minneapolis Convention Center in Minnesota. The conference features some very notable speakers, as well as the required CFP® Code of Ethics. With a target of 12 credited hours, programs have been designed to comply with the principles of the Certified Planner Board of Standards, MN and WI Insurance Continuing Education, National Association of State Boards of Accountancy (NASBA), as well as some Continuing Legal Education. Back by popular demand is Jack Sur-  
gent, and the consistently highest-ranking economist panel  – David Kelly, Jerry Webman and Rick Golod. Also this year, we present industry leaders Bob Veres, Roy Diliberto, Louis Stanasolovich and Mitch Anthony. In addition, there will be breakout sessions on Asset Allocation and Estate Planning for both the basic and advanced practitioner. The content is current and provides a diversity of knowledge.

For full details on the program, schedule, registration information and deadlines, visit the website

Hope to see you there!

Goodbye Dr. Larson!

Dr. Stephen Larson, Program Director, has taken a position at Ramapo College of New Jersey. During his time at Minnesota State Mankato, Dr. Larson worked to get the online program up and running as well as continuing the success of the classroom based program.

Dr. Larson will be missed here at MSU. We wish him the best of luck!

If you would like to send Dr. Larson a note, you can do so at Stephen.larson@mnsu.edu

I greatly enjoyed serving as Program Director for the Financial Planning Certificate Program. I learned a great deal and enjoyed working with terrific people.

I know the program will continue to be successful. I look forward to returning to the NYC area; it's been 15 years. I'll be serving as Associate Professor at Ramapo College of New Jersey.

Thank you,

Stephen

Ponder this!

Right now tuition cost $5,000 and assume an average household income is $50,000. Further, assume an education inflation rate of 6% and a wage inflation rate of 3%. What percentage of a family's income goes to tuition now? In 50 years, what percentage of a family's income (average household income) will go to tuition given these inflation rates?

Ponder this.

(Answer on page 4)
FPA of Minnesota—Become Involved!!

The Financial Planning Association is the community that fosters the value of financial planning and advances the financial planning profession. FPA is dedicated to facilitating the success of our members through leadership, advocacy, education and business development. We support the efforts of individuals who believe in and practice the financial planning process and share our Core Beliefs. FPA offers you the tools and resources you need to begin in your career and build your practice. Here you will meet mentors and colleagues who share your goals and want to help you succeed.

FPA offers 100+ member benefits!

• Multiple networking opportunities
• Free posting of resume in Career Center on FPA web site
• Journal of Financial Planning
• Solutions practice management magazine
• Valuable discounts on education resources
• Leadership development
• Volunteer opportunities to give back to the community
• Media Referrals
• Access to members-only sections of the FPA web site
• The professional recognition that you deserve

View all 100+ benefits!

Student memberships range from $35 - $175 per year. We'd love to have you give FPA a test drive by attending one of our monthly meetings at no charge. For more information, connect with Lynsey Wallin, Membership Director, or Joe Pitzl, Career Development Director for the FPA of Minnesota.

CONGRATULATIONS!

We would like to extend a special CONGRATULATIONS to our students who passed any of the past CFP® Certification Examinations!

We wish you the Best of Luck in your career!
Applying for the CFP® Certification Examination

After successful completion of our program (a “B” average is required for successful completion, if a “B” average is not received, proof of enrollment in a review course is required), you will receive information via U.S. Mail that will include your certificate of completion, the topic list for the CFP® Certification Examination and the application procedures for the CFP® Certification Examination.

Minnesota State University, Mankato will notify CFP Board you have completed our program. This will certify that you have completed the education requirement to sit for the Exam.

The application deadline for the CFP® Certification Examination is approximately 6 1/2 weeks before the exam date.

<table>
<thead>
<tr>
<th>Exam Dates</th>
<th>Application Deadline</th>
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<tr>
<td>July 17-18, 2009</td>
<td>June 3, 2009</td>
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<tr>
<td>November 20-21, 2009</td>
<td>October 6, 2009</td>
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<tr>
<td>March 19-20, 2010</td>
<td>February 3, 2010</td>
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You may register online for the CFP® Certification Examination.

Keir Educational Resources Review Course

The Minnesota State Mankato's Financial Planning Certificate Program has been working closely with Keir Educational Resources for the past several years. The joint effort has proven to be successful. The success is based on the Minnesota State Mankato program typically having a pass rate that exceeds the national average.

The cooperation includes integration of the Keir supplemental materials into our courses, as well as the review sessions offered in Minnesota. During their sessions, the course content is reviewed in a way that assists students to succeed on the CFP® Certification Examination.

Keir Educational Resources offers review courses in Minnesota prior to every exam. The upcoming review courses are:

<table>
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<tr>
<th>Review Course Dates</th>
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<tbody>
<tr>
<td>June 17-20, 2009</td>
<td>Courtyard in Bloomington</td>
<td>July 17-18, 2009</td>
</tr>
<tr>
<td>October 22-25, 2009</td>
<td>Courtyard in Bloomington</td>
<td>November 20-21,</td>
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Ponder This - Answer

2009: $5,000/$50,000 = 10%

2109: $92,101/$219,195 = 42%!