SPRING
March 7 - March 21, 2020
Fundamentals (3 Sessions)
April 4 - May 2, 2020
Insurance (3 Sessions)
May 16 - June 13, 2020
Investments (3 Sessions)

SUMMER
June 27 - July 25, 2020
Income Tax (3 Sessions)
August 8 - September 12, 2020
Retirement (3 Sessions)

FALL
September 26 - October 24, 2020
Estate Planning (3 Sessions)
November 7 - December 19, 2020
Capstone & Presentations (3 Sessions)
CFP® Certification Professional Education Program

Module 1: Fundamentals of Financial Planning
Fundamentals of Financial Planning is the introductory module in the ASM- Executive and Professional Education Center (EPEC) – Greene Consulting Hybrid Format of the CFP® Certification Professional Education Program. This module provides an overview of the basics of financial planning and the functions of the financial planner. As a prerequisite for other modules in the program, it covers financial planning tools and techniques, including financial statement analysis, basic economics, funding for education needs, and dealing with clients. The HP 12-C calculator is used to analyze time value of money problems.

Module 2: Insurance Planning
Insurance Planning is the second module in the ASM- Executive and Professional Education Center (EPEC) – Greene Consulting Hybrid Format of the CFP® Certification Professional Education Program. This module provides an in-depth overview of insurance products and insurance planning. The module covers both private and public sector forms of insurance.

Module 3: Investments Planning
Investment Planning is the third module in the ASM- Executive and Professional Education Center (EPEC) – Greene Consulting Hybrid Format of the CFP® Certification Professional Education Program. This module covers investment vehicles (stocks, bonds, mutual funds, etc.) and investment analysis approaches, thereby providing a solid foundation for effective investment planning.

Module 4: Income Tax Planning
Income Tax Planning is the fourth module in the ASM- Executive and Professional Education Center (EPEC) – Greene Consulting Hybrid Format of the CFP® Certification Professional Education Program. This module covers personal and business income taxation, providing current information and techniques critical for effective tax planning.

Module 5: Retirement Planning
Retirement Planning is the fifth module in the ASM-Executive and Professional Education Center (EPEC) – Greene Consulting Hybrid Format of the CFP® Certification Professional Education Program. This module is a comprehensive study of personal and employee-sponsored retirement plans, familiarizing participants with methods of gathering information and selecting appropriate options to achieve the client’s retirement goals.

Module 6: Estate Planning
Estate Planning is the sixth module in the ASM- Executive and Professional Education Center (EPEC) – Greene Consulting Hybrid Format of the CFP® Certification Professional Education Program. This module covers the property ownership issues, taxation issues, planning documents, and implementation strategies that encompass effective estate planning.

Module 7: Capstone Course
The Capstone is the seventh module in the ASM- Executive and Professional Education Center (EPEC) – Greene Consulting Hybrid Format of the CFP® Certification Professional Education Program. Upon completion of this module, the student will be able to Demonstrate a comprehensive understanding of the content found within the Financial Planning curriculum and effectively apply and integrate this information in the formulation of a financial plan.