



# Certified Financial Planner (CFP) Certification Education Option (FCFP)

Providing financial services and advice to individuals and families is one of the largest areas in terms of job opportunities for finance graduates. This career area encompasses several job functions and career paths, including financial planning, insurance, wealth management, private banking and estate planning. The Financial Planning Option (CFP Option) provides excellent preparation for students interested in the various aspects of providing financial services to individuals and families. The CFP Option prepares and qualifies students to take the Certified Financial Planner (“CFP”) professional licensing exam when they graduate. The CFP is a nationally recognized professional designation that positions students well for careers in financial planning and wealth management.

Students seeking to enter this area of finance should have excellent communication and people skills. A key to success in this field is the ability to establish new clients, earn their trust, and then maintain those relationships as the clients’ needs change. In addition to providing solid financial advice, it is important to be able to connect with clients on a personal level. Professionals in this area should also be genuinely interested in the financial markets and products and be able to converse with clients at a level of their understanding.

## **Additional Information**

CFP Option Career Paths.pdf