



THE  
**AMERICAN  
COLLEGE**  
OF FINANCIAL SERVICES®

# Expertise FOR Every Stage

Get started now at [TheAmericanCollege.edu](https://TheAmericanCollege.edu)

The Cary Maguire Building

# Expertise FOR Every Stage

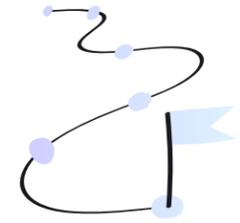
Engage with the profession's only practice-accelerating knowledge platform.

Your career requires different skills and know-how along the way. It's the same for your clients' financial lives: their needs change with age and life events. The American College of Financial Services helps deepen your growth and client service through applied financial knowledge.

Create your personal learning path on our platform, with career readiness programs, licensing preparation, foundational and specialized designations, certificate programs, a real-world graduate degree, and in-person educational experiences designed around you and your clients.

No matter where your journey starts — from your first job search to your first day as a firm owner — The College is your lifelong learning partner.

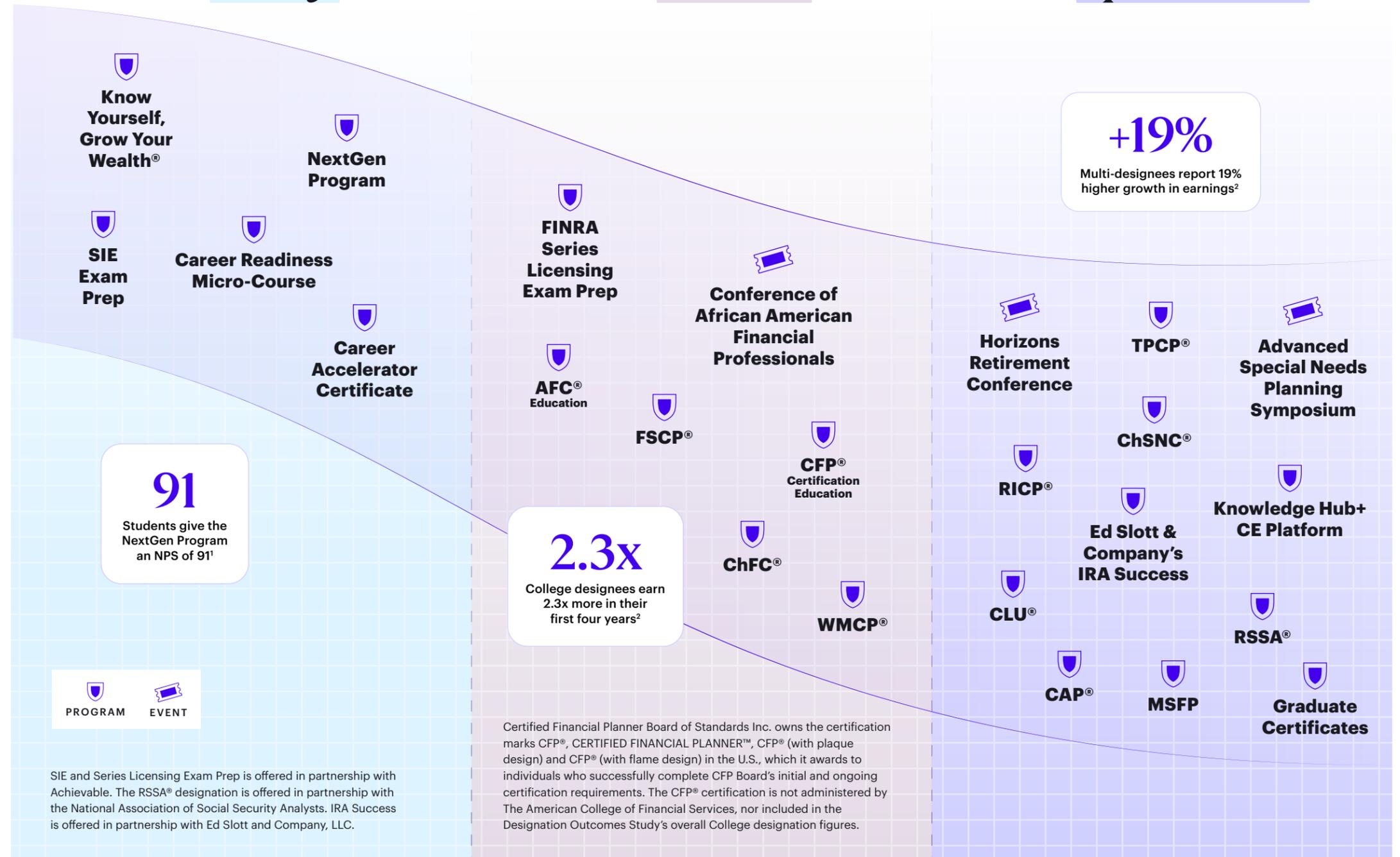
## Your Lifelong Learning Journey



### Get Ready

### Get Started

### Get Specialized



<sup>1</sup> The American College of Financial Services. CEEE NextGen Program Report. 2025. Net Promoter Score (NPS) measures satisfaction on a scale of -100 to 100, in which 80 or above is considered world-class.

<sup>2</sup> FUSE Research Network. The American College of Financial Services Designation Outcomes Study. 2024.

**STAGE ONE**

# Get Ready

Every career begins with a first step. Here's where you crystallize what's possible.

Financial services is the #1 career choice among Gen Z professionals.<sup>1</sup> It's also a great second career for those transitioning from the military or other fields. But unmet expectations can stop you in your tracks.

## Gen Z Development Outlook Is Murky



**741,543**

New hires are needed over the next decade<sup>2</sup>



**72%**

Leave the industry before finishing their training<sup>3</sup>



**1 in 4**

Gen Zers in financial services feel workplace training is ineffective<sup>4</sup>



# Visualize Your Path Through the Platform

As an undergrad preparing for your first job or a career transitioner looking to align your skills with a new passion and purpose, you can rely on The College's platform to help you become more knowledgeable and marketable.

Align ambitions and interests to opportunities, and start the educational pursuits that equip you for immediate impact. Here's one potential learning path to prepare for the road ahead.



*Know Yourself, Grow Your Wealth® will open your mind to a lot of opportunities out there. You will literally get to know yourself better.*

—2022 PROGRAM COMPLETER

<sup>1</sup> CFA Institute. Graduate Outlook Survey. 2023.

<sup>2</sup> The American College of Financial Services. President's Report. 2024. Based on BLS, Cerulli, and NAMIC.

<sup>3</sup> Cerulli. 2023.

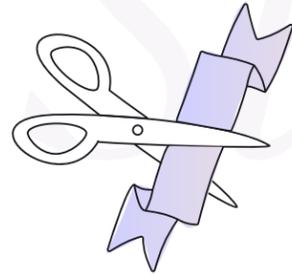
<sup>4</sup> The American College of Financial Services. Onboarding Gen Z Study. 2025.

Our learning platform offers affordable and impactful SIE licensing exam preparation, transitioner mentorship programs, foundational financial education, and career readiness and accelerator programs that prepare aspiring professionals for what comes next.

SIE Exam Prep is offered in partnership with Achievable.

# STAGE TWO

## Get Started



From the possible to the now, serving clients and offering solutions begins with the right education for you.

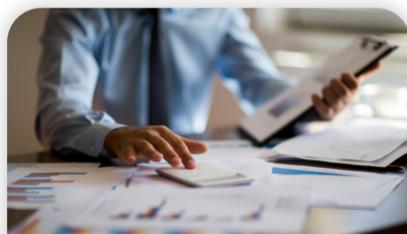
To help you flourish, you and your firm can create a personalized learning path focused on the foundational skills, technical knowledge, and emotional intelligence you need to navigate a lot of "firsts" with competence and confidence.

### College Designations Deliver Real Earnings Power



13%

Higher growth in earnings<sup>1</sup>



20%

Higher growth in earnings (under 40)<sup>1</sup>



1.6x

Higher earnings for client-facing pros<sup>2</sup>

FUSE Research Network. The American College of Financial Services Designation Outcomes Study. 2024.

<sup>1</sup> Based on reported three-year growth compared to financial professionals with no designations.

<sup>2</sup> Client-facing financial professionals include financial advisors, financial planners, representatives, and agents (not home office staff, executives, or field leaders). Figures are based on average earnings (total dollar amount) in the most recent year worked compared to client-facing financial professionals with no designations.

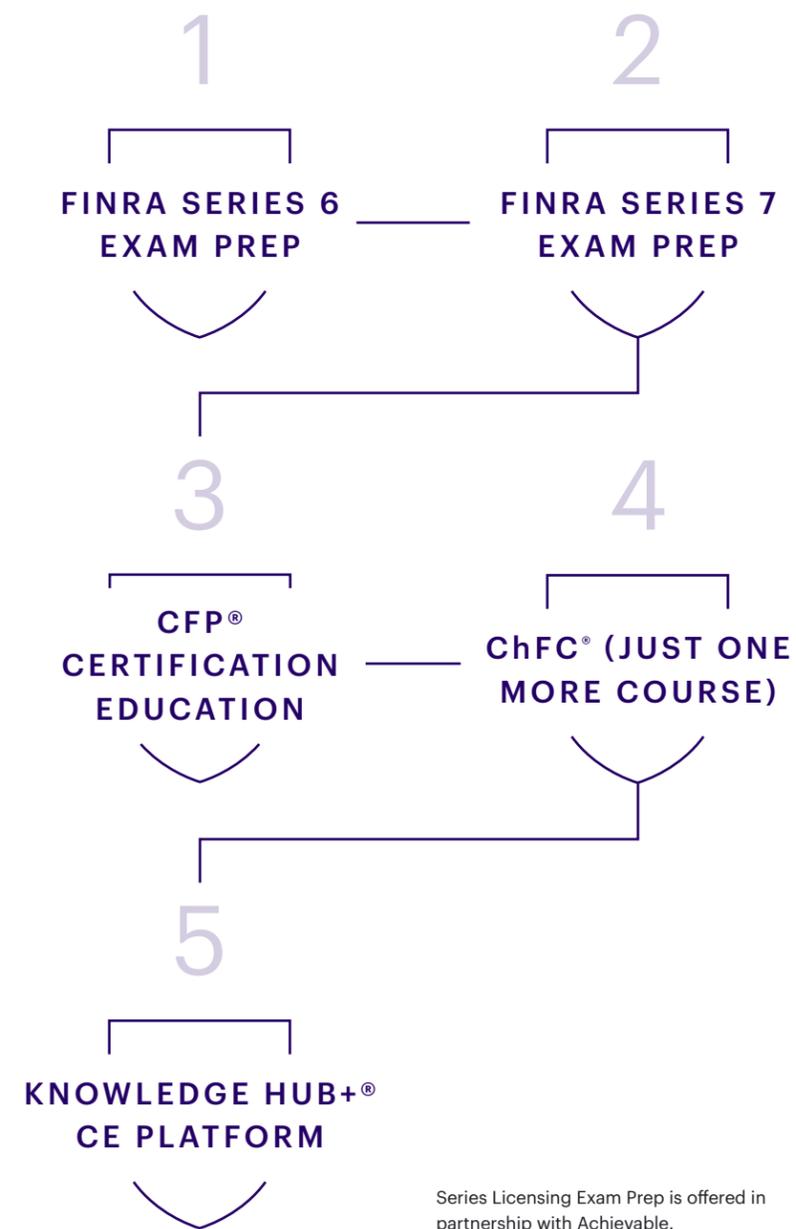
Our learning platform includes leading CFP® certification education, applied financial planning, or goals-based wealth management education, and foundational technical and soft skill courses.

You will become a skilled generalist capable of meeting the essential needs of your clients.

## Visualize Your Path Through the Platform

As a new professional trying to establish your career and your client base, foundational education and credentials are so important.

The College's platform can make you more confident and competent. As a new financial advisor at a financial planning firm, here's one path to success.



Series Licensing Exam Prep is offered in partnership with Achievable.



*I would highly recommend completing the ChFC® through The College. The additional insights I gained from this program increased my confidence in providing comprehensive financial advice and strengthened the value I deliver to my clients.*

—JACOB HURLEY, ChFC®

**STAGE THREE**

# Get Specialized



The more you grow, the more you learn — and the more you learn, the more you can earn.

As professionals expand their roles, client complexity follows. Higher stakes bring great opportunities for specialists who can deliver financial security. Specialized designations, graduate certificates, and in-person educational experiences provide the growth differentiator to attract and retain high-net-worth clients.

## Specialization Provides Immense Value



**9%**

Higher growth in earnings with a second designation<sup>1</sup>



**5%**

Higher growth in production with a second designation<sup>1</sup>



**20%**

Higher growth in earnings when a ChFC<sup>®</sup> adds an RICP<sup>®2</sup>

FUSE Research Network. The American College of Financial Services Designation Outcomes Study, 2024.

<sup>1</sup> Based on reported three-year growth among financial professionals with multiple designations compared to financial professionals with one designation.

<sup>2</sup> Based on reported three-year growth among advisors with the ChFC<sup>®</sup> and the RICP<sup>®</sup> compared to those with the ChFC<sup>®</sup>.

You can choose a specialized designation based on your clients' biggest needs, or develop a path for your entire firm to deliver multi-speciality, *true* comprehensive planning.

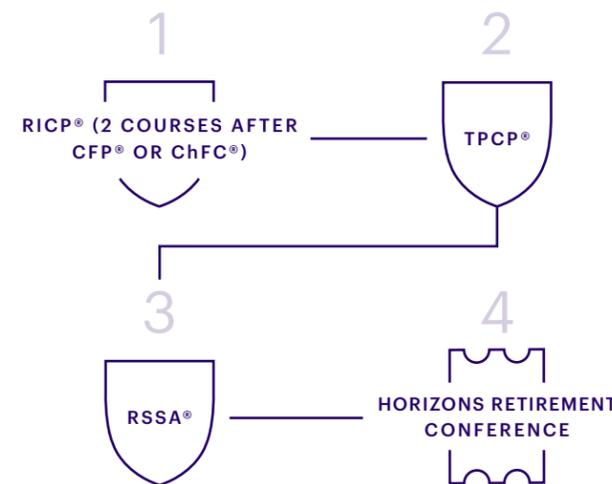
Deeper knowledge equals deeper networks and greater success.

# Visualize Your Path Through the Platform

As a seasoned advisor looking to take the next step, spur organic growth, and work with high-net-worth families, you must embrace specialization.

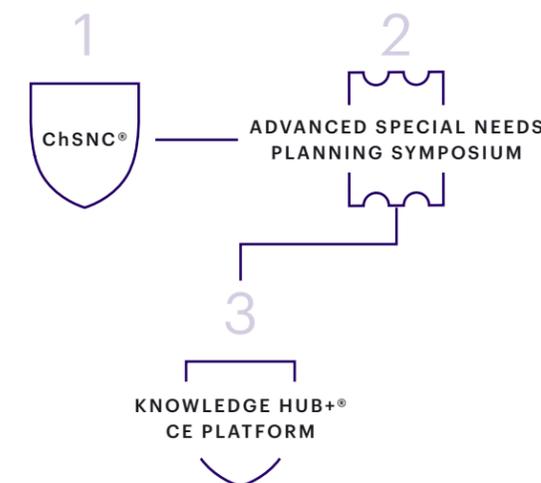
Here are two potential paths to firm growth through applied financial knowledge – because learning can lead to earning.

### ADVISOR 1



The RSSA<sup>®</sup> designation is offered in partnership with the National Association of Social Security Analysts.

### ADVISOR 2



*“TPCP<sup>®</sup> was fantastic. That gives us advisors an opportunity to be the expert to bring tremendous value and fantastic ideas to our clients. The return on investment is immeasurably high.”*

—MIKE CHONG, CFP<sup>®</sup>, TPCP<sup>®</sup>

*“*

*If retirement planning were a sport, Horizons would be an all-star game.*

—JOHN SUSZYNSKI, RICP<sup>®</sup>

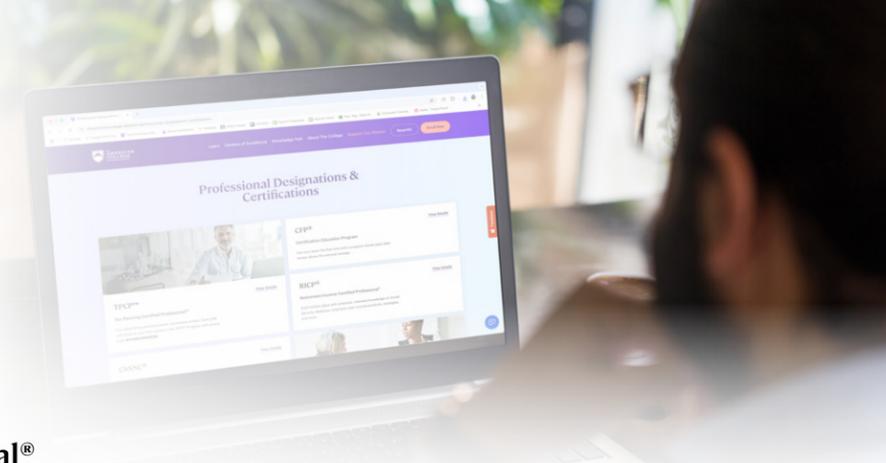
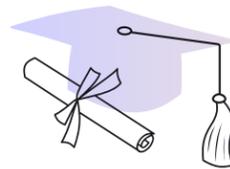
# Programs

- Designations & Certifications
- Masters & Graduate Programs

As your partner in lifelong learning, we offer a suite of programs to support you and your firm.

The College is a regionally accredited institution of higher education focused on your success and the financial security of countless families.

## Our Designations and Degree Programs



### FOUNDATIONAL

#### CFP® Certification Education Program

##### TIMING

As few as seven months

##### TUITION

\$5,545/package or \$985/course

##### TOPICS

Learn about financial planning roles and responsibilities, income taxation and principles of investments, retirement and estate planning strategies, and other fundamental financial planning principles.

#### ChFC® Chartered Financial Consultant®

##### TIMING

As few as eight months

##### TUITION

\$6,545/package or \$985/course

##### TOPICS

Gain extensive knowledge in core financial planning concepts, plus an advanced case study course as you work to understand the key components that will spur your success as a financial planner. Students can earn the ChFC® and sit for the CFP® exam.

#### FSCP® Financial Services Certified Professional®

##### TIMING

As few as four months

##### TUITION

\$695/course

##### TOPICS

Experience a 360-degree curriculum for running a financial services practice, with an emphasis on product knowledge, prospecting and marketing, and business planning principles.

#### WMCP® Wealth Management Certified Professional®

##### TIMING

As few as three months

##### TUITION

\$2,995/package or \$1,125/course

##### TOPICS

Gain the framework you need to build broadly diversified, tax-efficient portfolios aligned with your clients' goals, including tax and charitable planning needs and complex situations for business owners and executives.

## Become a Corporate Partner

Companies can develop personalized learning paths, integrate College learning management systems with internal technologies, and receive preferred tuition offers.

Join financial services' most innovative firms committed to upskilling and preparing their professionals to not just develop frameworks, but execute plans for their clients.

### SOME OF OUR TRUSTED PARTNERS



## SPECIALIZED

### AEP® Accredited Estate Planner® Education Program

#### TIMING

As few as three  
months

#### TUITION

\$2,050/course

#### TOPICS

Build the specialized skills you need to deliver sophisticated estate planning services and meet the requirements of the National Association of Estate Planners & Councils accreditation process.

### CAP® Chartered Advisor in Philanthropy®

#### TIMING

As few as six  
months

#### TUITION

\$4,495/package  
or \$2,050/course

#### TOPICS

Experience a graduate-level program that provides the specialized knowledge and tools you need to help clients articulate and advance their highest aspirations for self, family, and society.

### ChSNC® Chartered Special Needs Consultant®

#### TIMING

As few as five  
months

#### TUITION

\$2,895/package  
or \$1,025/course

#### TOPICS

Develop specialized expertise in financial planning for special needs individuals, their families, and caregivers with skills in tax planning, special needs trusts, Medicaid complexities, and disability planning resources.

### CLU® Chartered Life Underwriter®

#### TIMING

As few as four  
months

#### TUITION

\$4,095/package  
or \$985/course

#### TOPICS

Gain an in-depth understanding of the practical, legal, and ethical aspects of life insurance, risk management tools and techniques, and essential planning strategies for business owners.

### MSFP Master of Science in Financial Planning

#### TIMING

As few as 15  
months

#### TUITION

\$2,050/  
course

#### TOPICS

Unlock advanced expertise in the areas that matter most to your career and your clients by building foundational planning skills, deepening your knowledge in specialized areas, or preparing for an advanced leadership role. The program is a modular, multi-certificate curriculum with core requirements.

### RICP® Retirement Income Certified Professional®

#### TIMING

As few as three  
months

#### TUITION

\$2,795/package  
or \$1,025/course

#### TOPICS

Become a retirement specialist as you gain practical, applicable knowledge to build integrated retirement income plans, including Social Security claiming, long-term healthcare costs, taxation and legacy planning, and more.

### RSSA® Registered Social Security Analyst®

#### TIMING

As few as two  
weeks

#### TUITION

\$2,800/package  
or \$600/course

#### TOPICS

Learn how to integrate Social Security rules and benefits into your clients' retirement plans, including claiming strategies, asset taxation, and long-term care considerations. Distributed through a partnership with the National Association of Social Security Analysts.

### TPCP® Tax Planning Certified Professional®

#### TIMING

As few as four  
months

#### TUITION

\$2,795/package  
or \$1,025/course

#### TOPICS

Equip yourself with the skills to identify, evaluate, and implement comprehensive tax strategies including unique family situations, estate planning, retirement and savings, Roth conversions, and HSAs.

# Engage Beyond the Programs



The College's platform extends beyond the virtual classroom — with exclusive alumni benefits, event experiences, and communities that enable you to connect with a network of your peers.

## Events and Experiences

The College's active calendar includes in-person educational and networking opportunities, as well as premier philanthropic and recognition dinners.



### Horizons Retirement Conference

**2026 DATES:** May 4–6  
**LOCATION:** Orlando, FL  
**ATTENDEES:** Modern, committed retirement planners

The College's epic retirement planning experience includes mid-event excursions, tailored networking, and every workshop covering the topics that matter most to clients in or entering retirement.



### Advanced Special Needs Planning Symposium

**2026 DATES:** May 7–8  
**LOCATION:** Orlando, FL  
**ATTENDEES:** Special needs planners

The Symposium is one of the profession's only educational experiences focused on special needs planning for advanced practitioners.



### Conference of African American Financial Professionals

**2026 DATES:** August 3–5  
**LOCATION:** Chicago, IL  
**ATTENDEES:** African American financial professionals and allies

This community-focused conference advances the profession with real-world knowledge transfer and intentional networking focused on idea-sharing and growth-building.



### President's Dinner

**2026 DATES:** November 12  
**LOCATION:** Philadelphia, PA  
**ATTENDEES:** College donors, volunteers, and partners

The College's annual black-tie donor and recognition celebration salutes benefactors, volunteers, and industry icons and highlights charitable impact on society.

## Professional Recertification Program

Designees in good standing receive exclusive educational and marketing benefits.



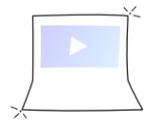
Subscription to Knowledge Hub+ with 80+ hours of CFP Board and College CE



Coming in 2026! Refresher courses with access to program updates



Marketing toolkits and a profile on consumer search tool, [YourAdvisorGuide.com](https://YourAdvisorGuide.com)



Designation awareness through national consumer campaign – 20M+ commercial views in 2025!

## Centers of Excellence

The College's eight Centers of Excellence intersect academic rigor and relevance, community, and industry. These Centers work with companies, practitioners, and scholars to:

- ✓ Deliver cutting-edge programming, research, and practice engagement
- ✓ Foster community through unique, boutique educational experiences
- ✓ Support the future through career readiness and mentorship programs
- ✓ Benefit society through financial education



THE AMERICAN COLLEGE  
**CENTER FOR ECONOMIC EMPOWERMENT AND EQUALITY®**



THE AMERICAN COLLEGE  
**CENTER FOR PHILANTHROPY AND SOCIAL IMPACT**



THE AMERICAN COLLEGE  
CARY M. MAGUIRE  
**CENTER FOR ETHICS IN FINANCIAL SERVICES**



THE AMERICAN COLLEGE  
**CENTER FOR RETIREMENT INCOME**



THE AMERICAN COLLEGE  
**CENTER FOR SPECIAL NEEDS**



THE AMERICAN COLLEGE  
O. ALFRED GRANUM  
**CENTER FOR FINANCIAL SECURITY**



THE AMERICAN COLLEGE  
**CENTER FOR MILITARY AND VETERANS AFFAIRS**



THE AMERICAN COLLEGE  
**CENTER FOR WOMEN IN FINANCIAL SERVICES**

**1,732** professionals attended College events in 2025.  
Join us at an in-person educational experience in 2026!

Visit [TheAmericanCollege.edu/Events](https://TheAmericanCollege.edu/Events)



# Your Lifelong Learning Partner

The American College of Financial Services is the leading educator in the financial services profession, with over 200,000 students successfully completing a course of study. As the premier provider of applied financial knowledge and education, The College offers professionals across financial services expertise for every stage of their careers and their clients' lives.



*To better serve our clients and be the center of their financial lives, continuous learning is no longer optional. The College's courses are valuable because they stay current and relevant with the ever-changing world of financial planning.*

—LETIAN DONG, CFP®, RICP®, ChFC®, RMA®, WMCP®



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