

ESSENTIAL COURSES FOR EARNING CFP®, ChFC®, OR CLU®



Shared course requirements allow you to earn multiple designations efficiently.

CFP® AND ChFC®: These two designations share a core of seven† common courses. CFP® professionals and those who have completed the required CFP® certification education coursework are just one course away from ChFC®.†

CLU®, CFP® AND ChFC®: Many of the elective courses that count toward the CLU® are also part of the ChFC® program and CFP® education curricula. By earning the CLU®, you may only need to complete up to four additional courses to earn the ChFC®. Students with the ChFC® or CFP® would only need an additional three courses to earn the CLU®.

COURSE NAMES	CFP® 7 required	ChFC® 8 required	CLU® 5 required / 3 elective	CFP®† to ChFC® Complete 1 additional course	CLU® to ChFC® Complete up to 6 additional courses	ChFC® / CFP® to CLU® Complete 3 additional courses
HS 300 Financial Planning: Process and Environment*	✓	✓	E		✓	
HS 311 Fundamentals of Insurance Planning*	✓	✓	✓			
HS 321 Income Taxation*	✓	✓	E		✓	
HS 323 Individual Life Insurance			✓			✓
HS 324 Life Insurance Law			✓			✓
HS 326 Planning for Retirement Needs*	✓	✓	E		✓	
HS 328 Investments*	✓	✓	E		✓	
HS 330 Fundamentals of Estate Planning*	✓	✓	✓			
HS 331 Planning for Business Owners and Professionals			✓			✓
HS 333 Personal Financial Planning: Comprehensive Case Analysis	✓	✓			✓	
HS 347 Contemporary Applications in Financial Planning		✓		✓	✓	
HS 375 Intro to Disability and Lifetime Planning			E			
HS 376 Legal And Financial Issues for Special Needs Families			E			

† Students who hold an active CFP® certification only need to complete Course HS 347 in order to earn the ChFC® designation.

* Courses delivered through the Personal Pathway™ learning model. These courses follow a flexible, yet structured learning path and incorporate best-in-practice learning concepts and rich multimedia components. These courses also include a digital textbook, instructor-led virtual classes live and on-demand, interactive lesson reviews, discussion forums, graded coursework and a final exam.