

DELIVERING AN INTEGRATED LEARNING JOURNEY

Shared Courses Makes Growing in Expertise Easy

Your learning journey doesn't have to begin or end with earning one designation. Shared courses across several of The American College of Financial Services' education programs make it easy to grow in expertise.



CFP® CERTIFICATION AND ChFC®:

These programs share a core of seven common courses. CFP® professionals who have completed the CFP® Certification Education Program at The American College of Financial Services are just one course away from obtaining the ChFC® designation.

CLU®, CFP® CERTIFICATION, AND ChFC®:

All elective courses available in the CLU® Program are also part of the CFP® Certification Education Program and the ChFC® Program. By earning the CLU® designation, you are six courses away from a ChFC® designation and five courses away from completing the CFP® Certification Education Program.

COURSE NAMES	CFP® CERTIFICATION EDUCATION 7 Required	ChFC® 8 Required	CLU® 4 Required/ 1 Elective**	CFP® to ChFC® Complete 1 additional course	CLU® to ChFC® Complete 6 additional courses	ChFC®/CFP® to CLU® Complete 3 additional courses
HS 300 Financial Planning: Process and Environment	R	R	E		R	
HS 311 Fundamentals of Insurance Planning	R	R	E		R	
HS 321 Income Taxation	R	R	E		R	
HS 323 The Tools and Techniques of Life Insurance Planning			R			R
HS 324 Legal Aspects of Life Insurance			R			R
HS 326 Planning for Retirement Needs	R	R	E		R	
HS 328 Investments	R	R	E		R	
HS 330 Fundamentals of Estate Planning	R	R	R			
HS 331 Planning for Business Owners and Professionals			R			R
HS 333 Personal Financial Planning: Comprehensive Case Analysis	R	R			R	
HS 347 Contemporary Applications in Financial Planning*		R		R	R	

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

** CLU elective may be satisfied through attainment of RICP®, WMCP® or ChSNC® designation.

An Educational Game-Changer

Personal Pathway™ is a unique, state-of-the-art, and responsive e-learning experience available in the CLU®, ChFC®, and CFP® Certification Education Programs.

Powerful features include:

- Flexible, yet structured and customizable learning paths
- Cutting-edge digital course resources accessible from anywhere and from any device
- Engaging online webinars and discussion forums
- Interactive lesson reviews, weekly office hours with instructors, and more
- One flat tuition rate, regardless of the options you choose



Have Questions?
Call **866-640-3748**

The American College of Financial Services does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP® (with flame logo) certification marks. CFP® certification is granted solely by Certified Financial Planner Board of Standards, Inc. to individuals who, in addition to completing an educational requirement such as this CFP Board-Registered Program, have met ethics, experience, and examination requirements.