

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 4 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		✓		✓	✓	

***CLIENT-FACING TRACK FOR CLU® TO ChFC®**

CLU® designees who meet The College’s definition of “client facing” are not required to take HS 300 or HS 333 to earn the ChFC® designation. A client facing CLU® will be able to earn the ChFC® by taking courses HS 321, HS 326, HS 328, HS 330, and HS 347.

† For students who completed the CFP® education requirements after 2012 or those who have successfully passed the CFP® exam. For pre-2012 students, two courses (HS 347 and HS 333) are required.