THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

Wealth Management Education: See Where We Stand

WMCP®
WEALTH MANAGEMENT CERTIFIED PROFESSIONAL®

	The American College of Financial Services — Wealth Management Certified Professional® (WMCP®)	Kaplan Financial/ College for Financial Planning — Wealth Management Specialist℠ (WMS℠)	Investments & Wealth Institute — Certified Investment Management Analyst® (CIMA®)
Tuition	· 3-Course Program Package: $2,550 · Individual Courses: $995	1-Course Program: $1,300	1-Course Program: $4,950 or less (dependent on partner insitution)
Time to Finish	12 months or less	6 months or less	9 months or less
Program Topics	Basic and advanced topics in wealth management, including: · Life-cycle and goal-based planning · Efficient investment portfolios · Financial instruments · Strategic wealth management · Complex planning strategies · Behavioral finance	Basic topics in wealth management, including: · Wealth management basics · Investment planning · Tax and insurance planning · Retirement and business planning · Personal planning	Basic and some advanced topics in wealth management, including: · Discretionary investment management · Investment policy and plan design · Portfolio construction · Investment fundamentals and advanced theory · Behavioral finance
Student Experience	Personal Pathway® learning experience includes: · Next-gen e-learning materials · Webinars and discussion forums · Monthly office hours with industry-leading instructors and dedicated 24-hour support team · Interactive lesson reviews · Choice of learning path	· Self-paced, no office hours · Contact support team available · Course topics, topic quizzes, practice and final exams	Executive education program; student experience dependent on partner institution (top-20 business schools)
Lifelong Learning Path	Course credits can be applied to select designation programs (CFP® Certification Education Program, ChFC®, CLU®)	Credit can be applied to course FP511 in the College for Financial Planning's CFP® Certification Education Program	CFA professional may sit for CIMA® exam and bypass executive education requirement
Years of Experience	Since 1927	Since 1972	Since 1985

Redefining the value of wealth management

For information and to enroll, visit **TheAmericanCollege.edu/WMCP** or call **866-724-2720**

PROGRAM INFORMATION GATHERED FROM PUBLICLY AVAILABLE MATERIALS. AS OF JUNE 2022.
LAST UPDATED JUNE 2022.