Wealth Management Education: See Where We Stand

THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

	THE AMERICAN COLLEGE OF FINANCIAL SERVICES® **WMCP®** **Wealth Management Certified Professional®**	COLLEGE FOR FINANCIAL PLANNING® A KAPLAN COMPANY **WMS℠** **Wealth Management Specialist℠**	INVESTMENTS & WEALTH INSTITUTE® **CIMA®** **Certified Investment Management Analyst®**
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 May 2023.

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