THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

Guide to *Programs*

Expand Your Opportunities with The American College

Designation/Degree Programs and Certification Education

RICP®

Retirement Income Certified Professional®

3 COURSES

In today's changing environment, the need for current, effective retirement income planning is greater than ever. Distinguish yourself with the RICP® and provide meaningful and sustained value to your clients in their retirement years.

TheAmericanCollege.edu/RICP

CLU®

Chartered Life Underwriter®

5 COURSES

Launched in 1927, the CLU® is the insurance profession's oldest standard of excellence. Today, it continues to be the premier designation for insurance professionals who desire to provide their clients with the security of life insurance and risk management.

TheAmericanCollege.edu/CLU

ChFC®

Chartered Financial Consultant®

8 COURSES

The comprehensive ChFC® designation provides critical training on the financial planning skills advisors need to serve the ever-evolving American demographic. Comprised of eight college-level courses, the ChFC® curriculum addresses all aspects of financial planning, with a special focus on practcal applications based on real-world case studies.

TheAmericanCollege.edu/ChFC

CFP®

Certification Education Program

7 COURSES

Know what you need to succeed on the CFP® exam, and apply what you learn to your practice as you study. Our seven course curriculum not only meets the learning objectives defined by the CFP Board, but our coursework is designed to provide you with a deep understanding of key concepts. Courses are revised often to ensure up-to-date accuracy and consistent alignment with the CFP Board exam.

TheAmericanCollege.edu/CFP

WMCP®

Wealth Management Certified Professional®

Use contemporary investment science to bring a new level of value to the advisor-client relationship through goal-based wealth management. Develop your skills in identifying goals, evaluating risk, and creating a sophisticated investment plan tailored to the needs of your client. Through a deep knowledge of tax-efficient portfolio strategies that integrates the newest research on client behavior, the WMCP® provides a unique education in applied investment planning.

TheAmericanCollege.edu/WMCP

FSCP®

Financial Services Certified Professional®

7 COURSES

The FSCP® Program covers all of the essential skills to successfully launch your career as a financial services professional or to grow your practice by marketing new products and services. Gain the practical knowledge and skills you need to establish a successful, ethical practice.

TheAmericanCollege.edu/FSCP

ChSNC®

Chartered Special Needs Consultant®

3 COURSES

Families caring for a person with special needs face unique financial challenges. The ChSNC® designation provides you with strategies and knowledge needed to help these families thrive. With the ChSNC®, you can give your career a higher purpose—and make a real difference in people's lives.

TheAmericanCollege.edu/ChSNC

CAP®

Chartered Advisor in Philanthropy®

3 COURSES

The CAP® provides you with the knowledge and tools you need to help clients reach both financial and philanthropic goals. A graduatelevel program, CAP® courses also count as credits toward the MSFP graduate degree.

TheAmericanCollege.edu/CAP

CLF®

Chartered Leadership Fellow®

3 COURSES

The CLF® Program provides you with the knowledge needed to achieve key organizational goals, such as recruiting and retaining top performers, developing business plans, and motivating others, covering practical applications with seminar-based programs.

TheAmericanCollege.edu/CLF

Graduate Programs

MSFP

Master of Science in Financial Planning

10 COURSES

The MSFP is an accredited graduate degree program that gives aspiring and active financial professionals the practical and relevant skills they need to improve the financial well-being of their clients.

TheAmericanCollege.edu/MSFP

MSM

Master of Science in Management

12 COURSES

The MSM offers you the opportunity to refine and deepen your essential leadership skills in such areas as managing group behavior, strategic leadership and influence, and organizational and crisis communication.

TheAmericanCollege.edu/MSM

AEP®

Accredited Estate Planner®

2 COURSES

Distinguish yourself as an estate planning specialist and a valuable member of a holistic planning team. Financial professionals can build the skills they need to deliver sophisticated estate planning services.

TheAmericanCollege.edu/AEP

THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

Course List for Designation/Degree Programs and Certification Education

FORMAL ADMISSION NOT REQUIRED

R=REQUIRED E=ELECTIVE

Course Names	Number of Courses	CLU®	ChFC®	CFP®*	RICP®	CAP®	ChSNC®	CLF®	FSCP®	WMCP®
		5	8	7	3	3	3	6	7	3
HS 300	Fundamentals of Financial Planning	E	R	R						
HS 311	Fundamentals of Insurance Planning	E	R	R						
HS 321	Income Taxation	E	R	R						
HS 323	Individual Life Insurance	R								
HS 324	Legal Aspects of Life Insurance	R								
HS 326	Planning for Retirement Needs	E	R	R						
HS 328	Investments	E	R	R						
HS 330	Fundamentals of Estate Planning	R	R	R						
HS 331	Planning for Business Owners and Professionals	R								
HS 333	Personal Financial Planning: Comprehensive Case Analysis		R	R						
HS 347	Contemporary Applications in Financial Planning		R							
HS 353	Retirement Income Process, Strategies and Solutions				R					
HS 354	Sources of Retirement Income				R					
HS 355	Managing the Retirement Income Plan				R					
HS 375	Introduction to Disability and Lifetime Planning						R			
HS 376	Legal and Financial Issues for Special Needs Families						R			
HS 377	Financial Planning for Families Caring for Those with Special Needs						R			
CHLF 400	The Leadership Role							R		
CHLF 410	Leadership Communication							R		
CHLF 420	Organizational Culture and Leadership							R		
CHLF 430	Strategic Leadership-Planning Theme: Strategic Plan							R		
CHLF 440	Team Leadership, Ethics, Diversity, and Crisis Leadership							R		
CHLF 450	Leading In A Changing Environment							R		
GS 839	Planning for Impact in Context of Family Wealth					R				
GS 849	Charitable Giving Strategies					R				
GS 859	Gift Planning in a Nonprofit Context					R				
FA 200	Techniques for Prospecting: Prospect or Perish								E	
FA 201	Techniques for Exploring Personal Markets								E	
FA 202	Techniques for Meeting Client Needs								E	
FA 222	Essentials of Multiline Skills								E	
FA 251	Essentials of Business Insurance								E	
FA 257	Essentials of Life Insurance Products								E	
FA 261	Foundations of Retirement Planning								E	
FA 271	Foundations of Estate Planning								E	
FA 290	Ethics for the Financial Services Professional								R	
FP 99	Foundations of Financial Planning								R	
WMCP 360	Introduction to Goal-Based Planning									R
WMCP 361	Efficient Investment Portfolios									R
WMCP 362	Strategic Wealth Management									R

If you currently hold, or once held, an active CFP® Certification, you can earn the ChFC® designation by completing HS 347, provided the courses were completed seven (7) years prior to the application date and the student earned a grade of C.

**CFP® Certification Education Program*

Course List for Graduate Programs

APPLICATION AND ADMISSION TO RICHARD D. IRWIN GRADUATE SCHOOL REQUIRED

MSFP Master of Science in Financial Planning

Course Names		ADVANCED FINANCIAL PLANNING	LEGACY PLANNING
MSFP 551	Planning for Impact in Context of Family Wealth	R	R
MSFP 559	Charitable Giving Strategies	R	R
MSFP 536	Gift Planning in a Nonprofit Context	R	R
MSFP 650	Techniques for Prospecting: Prospect or Perish	R	R
MSFP 554	Techniques for Exploring Personal Markets	R	
MSFP 555	Techniques for Meeting Client Needs	R	
MSFP 557	Essentials of Multiline Skills	R	
MSFP 558	Essentials of Business Insurance	R	
MSFP 615	Essentials of Life Insurance Products	R	
MSFP 631	Foundations of Retirement Planning	R	
MSFP 615	Foundations of Estate Planning		R
MSFP 563	Ethics for the Financial Services Professional		R
GS 839	Foundations of Financial Planning		R
GS 849	Introduction to Goal-Based Planning		R
GS 859	Efficient Investment Portfolios		R
MSFP 631	Strategic Wealth Management		R

MSM Master of Science in Management

12 Required Courses

Course Names		
MSMT 500	Graduate Management Orientation	R
MSLS 510	Leadership Development Experience	R
MSLS 511	Dynamic Organizational Leadership	R
MSLS 512	Ethics in Leadership	R
MSLS 513	Law, Compliance, Benefits and Social Responsibility	R
MSLS 514	Communications and Leadership	R
MSLS 515	Personal and Interpersonal Leadership Skills	R
MSLS 516	Management by Leadership	R
MSLS 517	Classic and Contemporary Leadership Styles	R
MSLS 518	Leading Strategy Development	R
MSLS 519	Decision Making Leadership Skills	R
MSLS 520	Leadership Capstone Experience	R

AEP® Accredited Estate Planner®

1 Required Course, 1 Elective Course

Course Names		
MSFP 615	Advanced Estate Management and Planned Giving	R
MSFP 589	Financial Statements and Business Valuation Analysis	E
MSFP 543	Business Succession Strategies	E
GS 389	Planning for Impact in the Context of Family Wealth	E
GS 849	Charitable Giving Strategies	E
MSFP 544	Executive Compensation	E

A Legacy of Industry Leadership

Founded in 1927 by financial services education pioneer Dr. Solomon Huebner, The American College of Financial Services has a rich history in financial services education—standing strong as the standard-bearer for academic quality.

The College's faculty includes the nation's top thought leaders in financial services practice and management, offering expertise that is sought by companies, policymakers, and students across the United States and abroad. The College's mission is to provide applied financial knowledge and education, promote lifelong learning, and advocate for ethical standards for the benefit of society.

Learn more at **TheAmericanCollege.edu** and connect with us on **LinkedIn**, **X (formerly known as Twitter)**, **Instagram**, **Facebook**, and **YouTube**.

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