

WFSI NEWS

Wisconsin Financial Services Institute at the
University of Wisconsin Oshkosh College of Business



NEW!
College of
Business offers
insurance
minor and
emphasis

The University of Wisconsin Oshkosh College of Business now offers students majoring in business the opportunity to develop careers in risk management and insurance through the Northeastern Wisconsin (NEW) insurance program.

The program is guided by an advisory board of insurance executives and provides annual scholarships and grants to attract future insurance leaders. Internship opportunities are also available.

For more information, contact Scott Beyer at (920) 424-7194 or beyers@uwosh.edu.

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CFP® Courses Now Offered Online!

The University of Wisconsin Oshkosh College of Business formed the Wisconsin Financial Services Institute (WFSI) to provide educational services to professionals in the financial services and insurance industries.

WFSI now offers online executive CFP® certification education in conjunction with Dalton Education, a leading provider of financial planning education materials.

This program is designed for students who have the discipline to self-study and requires participants to consistently watch lectures, read textbooks, complete homework and prepare for exams on their own time. It is perfect for students who cannot attend scheduled classes regularly and need flexibility.

The online, self-study program can be completed in nine months (or less) or can be extended for no extra charge allowing students to complete the program at their own pace.

This program is designed to fulfill the education requirement to sit for the CFP® Certification Examination.

The cost is \$2,500, which gives students access to the online self study program. Additional products such as live, online end-of-course reviews or The Dalton Review® for the CFP® Certification Examination can be added.

Course topics include:

- Fundamentals of Financial Planning and Insurance
- Investment Analysis and Portfolio Management
- Taxation of Persons, Property and Other Entities
- Retirement and Employee Benefits
- Estate Tax Planning

The program allows student to go in as much depth on topics as they want or lightly cover the topics they already know. This variable learning method will result in being able to successfully complete the program, in as much or as little time that they need, in order to understand the material.

Visit uwosh.course-central.com for more information.

UNIVERSITY OF WISCONSIN
OSHKOSH

College of Business

Wisconsin Financial Services Institute

WFSI Program Entry Requirements

The following are the minimum work experience and education level requirements to take WFSI courses:

1. A four-year degree.
2. Students should already possess knowledge, experience and capabilities for independently achieving success across the criteria for becoming certified as a financial planner. A minimum three years experience in the financial services industry or three years in a supervisory or executive position in a non-financial services company or government is required.
3. Applicants must complete an application, which needs to be approved by the WFSI program director, or WFSI representative, with the understanding that admission to the program subjects the participant to the appropriate aspects of the CFP® code of ethics and practice standards.

Anyone seeking admission who does not meet each of the above criteria may request admission subject to the discretion of the WFSI Program, or WFSI representative, whose decision shall be final.

Visit www.uwosh.edu/cob/wfsi/program-entry-requirements for more information.

Mark Your Calendar

- Registration deadline for Nov. 19-20 CFP® exam is Oct. 5

Visit www.cfp.net/become/examdetails.asp for online application.

- Academy of Financial Services (AFS) annual meeting
Oct 9-10 in Denver, CO
- Financial Planning Association (FPA) annual conference
Oct 9-12 in Denver, CO



For more events and updates, find WFSI on Facebook!

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The University of Wisconsin Oshkosh does not certify individuals to use the CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP (with flame logo) 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.