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DID YOU KNOW?

According to the 2010 Job Rated Almanac, financial planner is among the 20 best jobs in terms of income, stress, work environment, hiring outlook and physical demands.

According to the Financial Planning Association's 2010-2011 salary survey, nearly half of firms plan to hire more staffers in the next 12 months.

According to www.cfp.net, the bachelor degree requirement is a condition of initial certification; it is not a requirement to be eligible to take the CFP® Certification Examination and does not have to occur before sitting for the exam.

Give Yourself A Competitive Advantage

At one time, people trusted one insurance company to cater to all of their financial needs including planning for their future wealth. Over the last several years, there's been a paradigm shift in how people think and act resulting in an increased demand for qualified financial planners.



Jeff Jahnke (BBA '95, MS '98), an Oshkosh-based independent financial planner who completed the WFSI program in 2009, decided to study and sit for the Certified Financial Planner, or CFP®, certification for several reasons, including to gain a competitive advantage.

"Most financial planners will claim to do what I do," said Jahnke. "But if you put their business card next to mine, there are three letters after my name that communicate the difference."

At a time when many individuals are looking for ways to make the most of what they have, the designation has done good things for Jahnke's business, which has several offices throughout the state of Wisconsin.

"When the public sees the CFP® designation behind my name, they know I will protect their best interests," said Jahnke.

The WFSI was created to provide quality, convenient, continuing education courses and programs for local professionals to get

the education they need to receive the CFP® designation.

Before the WFSI, individuals wanting to receive the designation would participate in long-distance learning, which meant attending classes in Chicago or Minneapolis, or self-study programs.

"As a graduate of UW Oshkosh, I knew the campus like the back of my hand," said Jahnke. "Classes were held on Friday mornings which was convenient because I booked that time into my weekly work schedule."

Offering classes once a week at a set time often alleviates the stress of evening courses, which change days and times, especially for those individuals with small children and other commitments.

Choosing to participate in the WFSI program has additional benefits, too.

"It's not just book learning," said Jahnke. "The added value is the connection you have to professors like Scott Beyer, professor of finance, and Peter Westort, professor of accounting."

Some CFP® courses will teach students only what they need to pass the CFP® designation test, but the WFSI takes another approach by incorporating guest lecturers to speak on other industry topics.

"Other programs may be cheaper or allow you to study at your own pace, but the WFSI's program is a hybrid of teaching you what you need to know to pass the test and giving you information to grow as a professional," said Jahnke.

Want to know more? Visit www.uwosh.edu/cob/wfsi.

UNIVERSITY OF WISCONSIN
OSHKOSH

College of Business
Wisconsin Financial Services Institute

3 Reasons to Complete the CFP® Certification

Have you started the program, but haven't found the motivation to complete it? The Certified Financial Planner Board of Standards, Inc. gives you few reasons why it is important to finish.

THE PEOPLE HAVE SPOKEN

The CFP® Board conducted a nationwide consumer survey among upper-income households that reflected the public's growing demand for financial planners.

- 85% considered successful completion of a certification examination "very important" or "extremely important."
- 95% felt financial planners should adhere to professional practice standards.
- 97% said the most important standard for financial planners was adherence to a code of ethics.

PUT ME IN, COACH

Earning a CFP® certification can be a crucial step in your career path. The certification

prepares you for a career-long commitment to meeting the needs of your clients. As a CFP® professional, you become a coach and problem-solver, able to provide truly personalized services to clients and to maintain high levels of financial planning and professionalism.

SEEING IS BELIEVING

The CFP® certification is becoming increasingly recognized. Only individuals with this certification are authorized to use the CFP® marks in the U.S. Not only do consumers know these professionals meet rigorous professional standards, but also have agreed to adhere to the principles of integrity, objectivity, competence, fairness, confidentiality, professionalism and diligence when dealing with clients.

Visit www.uwosh.edu/cob/wfsi to get involved.

Mark Your Calendar

Please join us for the Student-Managed Endowment Fund spring presentation that will be held on our campus on April 21st, 2011 at 8:30AM. For more information and to register for the event, visit www.uwosh.edu/goto/COB/smef_invitation.html.

Upcoming CFP Exams Deadlines

Register by 6/7/11 for the 7/22-23 exam, 10/4/11 for the 11/18-19 exam.



Become a fan of our Facebook page for updates about our online CAPP class for talented high school students across the Fox Valley.

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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.

www.uwosh.edu/cob/wfsi