



MINNESOTA STATE UNIVERSITY MANKATO
at
Edina

CFP®

Certified Financial Planner Program

A professional continuing education program at our Edina campus.



The **CERTIFIED FINANCIAL PLANNER™** is the most highly recognized and respected professional certification among financial service professionals. Employment of personal financial advisors is projected to grow by 32 percent from 2010-2020. CFP® certification is a great way to advance your career. The program is just six courses and takes on average 12 months to complete. Classes are taught in person, meet once per week for four hours and are 12 weeks long.

PROGRAM HIGHLIGHTS

- Long history of success, program established in 1997
- Our graduates are among the highest CFP® exam pass rates in the nation
- Access to industry, networks, professionals and career resources.
- Complete your program at your own pace..... take one or two courses at a time.

REGISTER TODAY!

**mnsu.edu/cfp
507-389-1094
cfp@mnsu.edu**

2017- 2018 CLASSES

Class	Description	Instructor	Dates
202	Investment Planning	Josh Wolberg	4/25 - 7/11
205	Estate Planning	Cathy Egan	5/4 - 7/13
207	Tax Planning	Angie Veldhuizen	7/18 - 9/26
206	Capstone	Dan Heibert	7/20 - 9/28
204	Retirement Planning	John Comer	10/3 - 12/12
201	Insurance Planning	Josh Wolberg	10/5 - 12/21
205	Estate Planning	Cathy Egan	1/9 - 3/20
202	Investment Planning	Josh Wolberg	1/11 - 3/22
206	Capstone	Dan Heibert	3/27 - 6/5
203	Tax Planning	Angie Veldhuizen	3/29 - 6/7



MEET THE INSTRUCTORS

John Comer, CFP®, Waddell and Reed helps consumers identify, plan for and achieve their financial goals. Also, he speaks and writes to enhance the financial capabilities of consumers and the communication skills of financial professionals. Retirement Planning is a special interest for John but he has also taught all or part of Investments, Financial Planning and Insurance, Estate Planning and the Capstone class as well. He has been an adjunct professor in several local programs since 2005. John was awarded FPA's Heart of Financial Planning Award, FPA-MN's Distinguished Service Award and BestPrep's Service Award for his work to enhance consumer financial capabilities. He has been involved in many efforts to enhance financial capability in the Twin Cities and around the country. John's specialties include financial planning, retirement planning, speaking and writing.



Cathy Egan, JD, CFP®, Ameriprise Financial Services, Inc. works at Ameriprise Financial doing regulatory supervision of investment advisory services. Cathy has served as an Adjunct Instructor for four years specializing in courses covering Estate Planning. She graduated from the University of Minnesota Law School in 1993 and attained her CFP® in 2011. When not immersed in financial planning, she loves traveling with her husband and teenaged boys and being outside.

Dan Hietbert, CFP®, Oak Financial Planning, Inc., ActiFi has been an instructor with Minnesota-State Mankato for 7+ years. He also teaches the CFP Review course for Keir Educational. Dan believes in active learning in the classroom, and students report a high level of engagement and success as they further their careers. Serving the Twin Cities area, Dan is a CFP® professional who has been in the financial services industry for 20+ years. Dan also consults with financial advisors and financial firms on productivity improvements. He currently owns a fee-only financial planning firm that specializes in working with closely-held small businesses. Dan blogs on pertinent business valuation topics at beyondvalu.com. Dan earned a BS in Business from Hamline University in St. Paul Minnesota and a Master of Science in Financial Services degree from The American College. Currently a doctoral student at The American College, earning a PhD in Financial Services.



Dustin Smith CFP®, ChFC®, Wealth Enhancement Group is Vice President, Wealth Counselor at Wealth Enhancement Group, where he works with a team of specialists to create, monitor and adjust comprehensive financial plans for his clients. He is a 2015-2017 winner of the "FIVE STAR Wealth Manager" award as noted in Mpls. St. Paul Magazine and Twin Cities Business. He has been teaching at the Mankato State University CFP® Professional program since 2011.

Angie Veldhuizen, CFP®, JD, MBT, Accredited Investors Inc. is a Wealth Manager at Accredited Investors Wealth Management in Edina. Angie focuses her work on tax planning including income tax, estate tax, gift tax, tax deferred and tax advantaged accounts and timing of income. She also serves as a firm resource on matters involving Social Security and marital/divorce planning. Angie started her career at Deloitte Tax working with individuals, trusts and estates. Desiring a more comprehensive approach to her client's finances, she transitioned to wealth management. Angie is a Certified Financial Planner and is a licensed attorney. She holds a J.D. from Mitchell Hamline School of Law, a Masters of Business Tax from the University of Minnesota and a Bachelors of Science in Agricultural Business and Economics from Iowa State University.



Josh Wolberg, MBA, CFP®, Channel Financial is a CFP® professional and leads the wealth management team at Channel Financial in Golden Valley, MN. Josh teaches many of the financial wellness workshops to retirement plan participants in the 160+ retirement plans Channel advises. He earned a BS in Computer Science from South Dakota State University and an MBA in Finance from the Carlson School of Management at the University of Minnesota - Twin Cities. Josh is an active member of the Financial Planning Association and has served on several committees and boards. In addition to working full-time as a CFP® practitioner, Josh has a passion for lifelong learning and teaching. He serves as an instructor for Minnesota State University and Keir Resources where he teaches CFP® preparation courses. Josh volunteers to teach personal finance basics at local high schools for a non-profit organization.

WHAT GRADUATES ARE SAYING

"Instructors brought a lot of great insight to the classroom."

"My professor stayed after class for nearly 30 minutes one day talking about her career and advice she has for me coming into the industry."

"Overall the teachers were the highlight of the program."

"Real life experiences from the instructors."



Center for Talent Development

