The Certified Financial Planner (CFP®) designation is one of the most highly recognized professional designations among financial services professionals, not only in the United States, but also in a number of other countries in the world.

Minnesota State University, Mankato’s Financial Planning Certificate Program was initiated in 1998 with an approval of the curriculum by the CFP Board of Standards in Denver, CO. The prime purpose of the program is to provide the educational requirements needed to sit for the CFP’s Certificate Examination. The CFP Board is the sole authority for awarding CFP designation.

Since its inception in 1998, the enrollment for the program has been rising steadily. For the Spring semester ended May 2001, there were about 35 individual taking courses, as compared to the initial year’s enrollment of about 14. Up until now, our program was limited to working students; however, to provide a generous support of the American Express Financial Services, beginning this Fall, we were able to expand our program, by adding the weekday module class in Minneapolis downtown. This would allow for individuals to have more flexibility for scheduling and completing our program.

Recently, the Board of Directors, Financial Planning Association, Minnesota Chapter, adopted a motion to provide tuition scholarships for its chapter members who demonstrate excellence in academic work in the certificate program.

Financial Planning Certificate Program

Three College of Business students were among six teams selected to compete in the final round of the Student American Express Planning Invitational Financial Planning Case Analysis Competition held in Minneapolis, Minnesota in April 2001. Cravy Ewing, Lori Fick, and Rob Reimer created a comprehensive financial plan for a fictitious family. At the competition, they were given three hours to prepare an oral presentation for a panel of industry experts, and were tested in a game show-type trivia event.

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