

ChFC[®]

Chartered Financial Consultant[®]

*New Online
Classes Available!
Details Inside!*



Financial Planning's Highest Standard of Knowledge and Trust



Earn the designation that represents the Highest Standard of Knowledge and Trust in the industry: the Chartered Financial Consultant® (ChFC®)!

The American College has developed the ChFC® to be the pinnacle of financial planning excellence.

- Since 1982 more than 41,000 ChFC® designations have been awarded
- Awarded by The American College, a regionally accredited institution of higher education
- Every designee is required to adhere to a strict code of ethics
- A robust curriculum with more content than any other designation

Flexible Study and Payment Options Available.

At The American College we work to ensure that our students are able to get the most from our courses and designations. You may find it easier to do your own thing and self-study using our industry leading course materials. Maybe you get more out of the classroom environment. Either way, we've got you covered.

Self-Study (Pay Per Course)

Self-study gives you total flexibility. There are no scheduled classes and no weekly assignments. You can study at your own pace wherever or whenever is most convenient for you. Complete your course as fast as you like with the leading edge tests and access to extensive online study aids at no additional charge, including:

- Supplemental readings
- Online discussion with course professors
- Multimedia resources
- Practice exams

Live Online

Selected courses in the ChFC® curriculum are available in a live webinar format. These courses have the best instructors in the market leading ten-week classes and answering your questions to make sure you understand the material.

- Live discussion with faculty and students
- Interactive online study tools

All the benefits of a live class without the travel!

Monthly Pay* (Self-Study)

This cost-effective program is ideal for independent advisors or students without company reimbursement. Low monthly fees have no interest charges, and rates are guaranteed during the course of the program. Available at a package price for all nine courses only.

- Easy, low monthly payments are available
- Materials for each course will automatically be shipped to you when you finish the previous one
- Great for independent advisors and brokers

It's the most convenient way to finish your program. Visit our website to learn more:

TheAmericanCollege.edu/Success.

* Available only to new students





The ChFC® Curriculum At A Glance

Required Courses: 7 • Electives: Choose 2

Financial Planning: Process and Environment HS 300

- The financial planning process
- Meeting client needs through financial planning
- Communications techniques
- Ethics in financial planning

Required

Fundamentals of Estate Planning HS 330

- Forms of property ownership
- Lifetime transfers
- Trusts, trustees, and other fiduciaries
- Federal estate taxation

Required

Fundamentals of Insurance Planning HS 311

- Basic concepts of risk and insurance
- Managing risks
- Types of insurers and their marketing operations
- Insurance company operations

Required

Financial Planning Applications HS 332

- Case analysis used for integrating planning techniques
- Provides practical experience in solving financial problems
- Complex situations involving personal financial problems
- Dissects financial problems associated with businesses

Required

Income Taxation HS 321

- Items of gross income
- Business expenses and expenses for income production
- Itemized deductions
- Tax credits

Required

The Financial System in the Economy HS 322

Elective

Planning for Retirement Needs HS 326

- Choosing the best tax-advantaged retirement plan
- Tailoring plans to client objectives
- Plan funding and investing
- Individual retirement arrangements

Required

Estate Planning Applications HS 334

Elective

Executive Compensation HS 342

Elective

Investments HS 328

- Securities markets
- Fixed-income securities
- Mutual funds
- Real estate investments

Required

Financial Decisions for Retirement HS 352

Elective



The Leader in Financial Services Education

The American College is a nonprofit educational institution with the highest level of academic accreditation, dedicated to leadership in innovative training and development for financial services professionals.

The College is distinguished by resources of the highest quality, innovation in program delivery and design, and results that create sustainable advantages for our customers.

Serving as a valued business partner to banks, brokerage firms, insurance companies, and others for over 80 years, The American College has assembled a faculty of the foremost thought leaders in the industry to help companies and their associates succeed.



270 S. Bryn Mawr Avenue
Bryn Mawr, PA 19010-2196
888-263-7265
TheAmericanCollege.edu/ChFC

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The American College is accredited by the Middle States Commission on Higher Education, 3624 Market Street, Philadelphia, PA 19104, (215) 662-5606.

Additional Program Requirements

To ensure that those who earn the ChFC® are the most qualified and knowledgeable in financial services, there are additional program requirements which must be fulfilled:

- Experience requirements
- Take the Professional Ethics Pledge
- Professional Achievement in Continuing Education (PACE) Recertification Program requirements

The Commitment of a ChFC®

In all my professional relationships, I pledge myself to the following rule of ethical conduct: I shall, in light of all conditions surrounding those I serve, which I shall make every conscientious effort to ascertain and understand, render that service which, in the same circumstances, I would apply to myself.

How to Register for Your Courses

Register for all programs at The American College in one of three easy ways!

Online

Create your user account and register for your course at TheAmericanCollege.edu

Mail or Fax

Complete the course registration found online and return it via mail or fax. Our fax number is 610-526-1300

Phone

Call our Professional Education department, Monday-Friday 8am – 6pm ET at 888-263-7265

The mark of ChFC® is the property of The American College and may be used by individuals who have successfully completed the initial and ongoing certification requirements for this designation.