



# Workforce Investment Act Eligible Training Program

**Provider Name:** Bryant University Executive Development Center Contract #4050-09

**Address:**

1150 Douglas Pike  
Smithfield, RI 02918

**Address if program is held at a another site:**

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**Program Name:** Financial Planning Certificate Program

Office use only ONET Code: 13-2052

### CONTACT INFORMATION

Program Contact Person: Amy Hanson	Phone: 401-232-6203 Email: <a href="mailto:ahanson@bryant.edu">ahanson@bryant.edu</a>	Fax: 401-232-6704 Website: <a href="http://edc.bryant.edu">edc.bryant.edu</a>
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### Course Outline/Topics to be Covered

Bryant's Financial Planning Certificate Program provides the knowledge and the expertise required to deliver full-service financial guidance. This program presents the techniques and knowledge necessary to formulate and execute comprehensive financial plans that will assist clients in accumulating, conserving, and transferring personal wealth. This was the first program in RI registered with Certified Financial Planner board of Standards, Inc. Courses include Introduction to Financial Planning, Insurance & Risk Management, Investment Planning, Tax Planning, Employee Benefits & Retirement Planning, Estate Planning, and the Financial Planning Capstone Course. Please refer to our web site at [edc.bryant.edu](http://edc.bryant.edu) for more information. This certificate program can be completed in 18 months. Courses are available on-campus in the evenings or as self-paced online courses.

### Required academic grade levels to enter program

Reading Grade Level 12  
Math Grade Level 12  
English Proficiency Fluent

### Required to enter training program

Physical	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Vaccinations	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Drug test	<input type="checkbox"/> Yes	<input type="checkbox"/> No
BCI	<input type="checkbox"/> Yes	<input type="checkbox"/> No
License	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Tools	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Experience	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Other :		

### MAY be required for employment

Physical	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Vaccinations	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Drug test	<input type="checkbox"/> Yes	<input type="checkbox"/> No
BCI	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Certification	<input type="checkbox"/> Yes	<input type="checkbox"/> No
License	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Tools	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Experience	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Other :		

### Participants will be qualified to seek employment in the following occupations:

- 1) Personal Financial
- 2) Financial Analysts
- 3) Financial Managers
- 4)

### Is this program Pell grant eligible?

Yes  No

### PROGRAM COSTS:

TUITION INCLUDES:	These are expenses that <u>MAY</u> be reimbursed after successful completion of training.	Participant is responsible for :
Tuition \$5,625.00	<i>Please indicate Yes, No or enter the amount</i>	Prerequisites _____
Fees _____	<b>YES</b> <b>NO</b> <b>AMOUNT</b>	Memberships _____
Books <u>not included</u>	Books <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No \$1,095.00	_____
Licensing _____	Licensing <input type="checkbox"/> Yes <input type="checkbox"/> No _____	_____
Certificate fees _____	Tools <input type="checkbox"/> Yes <input type="checkbox"/> No _____	_____
Other, provide explanation _____	Uniforms <input type="checkbox"/> Yes <input type="checkbox"/> No _____	_____
	Travel <input type="checkbox"/> Yes <input type="checkbox"/> No _____	_____
	Miscellaneous <input type="checkbox"/> Yes <input type="checkbox"/> No _____	_____
<b>Total Tuition Cost \$5,625.00</b>	<b>Total \$1,095.00</b>	<b>Cost above tuition cap \$125.00</b>
		<b>Expenses that <u>MAY</u> be reimbursed \$1,095.00</b>
		<b>Total \$1,220.00</b>

**Maximum ITA Responsibility (Max. \$5500)**  
**\$5,500.00**

**Additional Information** Courses are offered on-campus and/or online

**What type of certificate will be awarded and by whom?**