



Workforce Investment Act Eligible Training Program

Provider Name: BRYANT UNIVERSITY-EXECUTIVE DEVELOPMENT CENTER

Contract #:5050-09

Address:

1150 DOUGLAS PIKE
SMITHFIELD, RI 02917

Address if program is held at a another site:

Program Name: Financial Planning Certificate

Office use only: ONET CODE 13-2051

CONTACT INFORMATION

Program Contact Person: Amy Grant	Phone: 401.232.6203 Email: agrant2@bryant.edu	Fax: 401.232.6704 Website: http://edc.bryant.edu
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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. 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 for more information. This certificate program can be completed in 12 months. Courses are available as self-paced online courses.

Required academic grade levels to enter program

Reading Grade Level 12

Math Grade Level 12

English Proficiency _____

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 Advisors
- 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 \$3,680.00	<i>Please indicate Yes, No or enter the amount</i>	Prerequisites _____
Fees _____	YES NO AMOUNT	Memberships _____
Books _____	Books <input type="checkbox"/> Yes <input type="checkbox"/> No	Financial Calculator or _____ \$50.00
Licensing _____	Licensing <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Web Camera _____ \$25.00
Certificate fees _____	Tools <input type="checkbox"/> Yes <input type="checkbox"/> No	_____
Other, provide explanation _____	Uniforms <input type="checkbox"/> Yes <input type="checkbox"/> No	Cost above tuition cap <u>\$0.00</u>
	Travel <input type="checkbox"/> Yes <input type="checkbox"/> No	Expenses that <u>MAY</u> be reimbursed <u>\$595.00</u>
	Miscellaneous <input type="checkbox"/> Yes <input type="checkbox"/> No	
Total Tuition Cost \$3,680.00	Total \$595.00	Total \$670.00

Maximum ITA Responsibility (Max. \$5500)

\$3,680.00

PROGRAM LENGTH

Weeks and Hours and

Additional Information

Self paced online. 20+ hours per week for 12 months.

What type of certificate will be awarded and by whom?

Bryant University Financial Planning Certificate