



The Behavioral Financial Planning **EXPERIENCE**

May 14-17, 2020

in cooperation with the University of Georgia
Center for Continuing Education & Hotel

Frequently Asked Questions

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Who should take the 3-day immersive course?

This program is designed for financial planners who wish to have a deeper understanding and insight into client behavior and tools to help navigate clients towards meeting financial goals and achieving well-being. The program will appeal to those who own a financial planning practice, employees of boutique financial planning firms, financial therapists, and others who want to participate in experiential learning activities.

Are there any prerequisites for enrolling in course?

No. There are no prerequisites for enrolling in program.

Why should I complete the course?

Traditionally, financial planning has been a service built around technical planning competencies related to the analysis of objective client characteristics and factors. With the advent of robo-advisory services, the traditional practice of financial planning is slowly being eroded, with consumers and regulators demanding evidence of added value through the financial planning process. One area that financial planners add value is by using counseling, communication, and client psychological and relational skills to help clients meet lifetime financial goals. A key element of this value-added proposition is the need to develop, practice, and expand client communication, counseling, and behavioral skills. The University of Georgia is in a unique position, being the leading research and teaching hub for the study, application, and instruction of behavioral financial planning, which includes elements of client psychology, financial therapy, and financial counseling.





How many participants will be attending the course?

The program size is limited to allow meaningful interaction between the participants and the instructors. The class size is capped at 15 participants.



What is behavioral financial planning?

Behavioral financial planning, as conceptualized at the University of Georgia, is defined as a method of creating and achieving goals by applying psychological and relational insights into the financial planning process to enhance individual and family well-being.

What do I receive when I complete the course?

Successful graduates of the program will receive 18.5 CFP® continuing education credits, including 2 hours of ethics training. Additionally, if appropriate, graduates can earn 1.85 Continuing Education Units (CEUs) from the University of Georgia. All graduates will earn a Digital Badge to post to your social media assets. Your Digital Badge recognizes your accomplishment as well as builds your brand and credibility.

What are the technology requirements for taking the course?

Participants may want to bring their own laptop computer for note-taking. Any additional technology needed to complete the program will be provided. The Georgia Center offers complimentary wireless access to the Web.

What is included in the course fee?

The course fee includes instructional materials, three nights of lodging, parking, AM and PM breaks, and lunch each day.

Does the Georgia Center accommodate special diets?

If you require special services, facilities, or dietary considerations to support your participation in this course, please contact us at 706-542-3537 or e-mail student@georgiacenter.uga.edu.

What is the cancellation/refund policy?

The Georgia Center will gladly issue refunds (minus a \$250 processing fee) for cancellations made on or before April 9, 2020. Written requests for course cancellation must be sent to student@georgiacenter.uga.edu to be processed. No refunds will be made for cancellations after April 9, 2020. Substitutions are welcomed with advance written notice to the Georgia Center. When booking airline reservations, you will want to make sure the tickets can be refunded in the event that the course does not meet the minimum enrollment. If a program is canceled for any reason, the Georgia Center will not be responsible for any cancellation/change charges assessed by airlines or travel agencies.

*This 3-day immersive course is supported by the
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