The Behavioral Financial Planning EXPERIENCE

UNIVERSITY OF GEORGIA
Center for Continuing Education & Hotel

May 14-17, 2020 | in cooperation with the University of Georgia Center for Continuing Education & Hotel

Learning Objectives, Features, & Benefits

Learning Objectives

After completing this 3-day program, you should be able to:

1. Develop strategies to incorporate elements of client psychology into financial planning practice.
2. Understand and assess client attitudes and preferences in a valid manner.
3. Develop a financial therapy toolkit.
4. Understand the principles of behavior finance.
5. Develop fundamental skills in client communication.
6. Appreciate the complexity of diversity issues in financial planning.
7. Apply CFP® practice standards and ethics within the behavioral financial planning scope of practice.

Successful enrollees earn a Digital Badge and 18.5 CFP® credit hours.

What is Behaviorial 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.

Features & Benefits of the Course

Features:

- A program managed and delivered by the University of Georgia, a premier US educational institution and recognized global leader in financial planning education.
- A dynamic and cutting-edge curriculum, presented by global-leading academic and applied researchers and practitioners.
- Engage with University faculty in one-on-one and small group interactions in a 3-day in-person format that meets the needs of busy working professionals.
- Obtain hands-on experience and practice in a clinical setting.
- Course approved by Certified Financial Planner™ Board.
- A program of study qualifying for continuing education for Certified Financial Planner™ professionals.

UNIVERSITY OF GEORGIA
Center for Continuing Education & Hotel

Benefits

- Advance your career by enhancing your skills related to behavioral financial planning.
- Learn the fundamental aspects of client-centered financial planning and financial therapy.
- Earn 18.5 CFP® continuing education credits, including 2 hours of ethics training.
- Earn 1.85 University of Georgia continuing education units (CEUs) and a Digital Badge.
- Expand your knowledge of the newest behavioral financial planning techniques, including solution-focused therapy tools and techniques.
- Learn to communicate more effectively with clients using the strategies presented in the program.
- Learn to incorporate elements of client psychology into financial planning practice.
- Expand your solution-focused financial therapy toolkit.
- Gain insights into the assessment of client attitudes and behaviors.
- Learn about the complexity of client biases and diversity issues faced in financial planning.

This 3-day immersive course is supported by the University of Georgia Family and Consumer Sciences

College of Family and Consumer Sciences
Financial Planning
UNIVERSITY OF GEORGIA

For more information about The Behavioral Financial Planning Experience program, contact questions@georgiacenter.uga.edu or dial +1-706-542-3537