

UNIVERSITY OF ST. THOMAS CFP® CERTIFICATION EDUCATION PROGRAM
REQUIRED COURSE TEXTBOOKS & CALCULATOR – SPRING 2010

The following course materials can be purchased at the UST Bookstore, 713-525-3806, or on-line from various vendors. Please make sure you purchase the latest editions.

Session I

Introductory Weekend Course

Required Calculator: *Hewlett Packard HP-10BII Business Calculator*

Understanding Your Financial Calculator, 4th edition, Dalton, Kaplan Financial, 2006, ISBN 1419559818

PFP 1 – Personal Financial Planning and Insurance Planning

Personal Financial Planning Theory and Practice, 5th edition, Dalton and Dalton, Kaplan Financial, 2007, ISBN 9781427769909

Principles of Risk Management and Insurance, 10th edition, Rejda, Pearson Addison Wesley, 2007, ISBN 0321414934

PFP 2 – Investment Planning

Fundamentals of Investing, 10th edition, Gitman and Joehnk, Pearson Addison Wesley, 2007, ISBN 0321489381

PFP 3 – Income Tax Planning

Income Tax Planning for Financial Planners, Third Edition, Langdon, Grange, and Dalton, ME, 2010, ISBN 9780980129960

Session II

PFP 4 – Retirement Planning

Tools & Techniques of Employee Benefits and Retirement Planning, 11th edition, Leimberg and McFadden, The National Underwriter Company, 2009, ISBN 9780872189874

PFP 5 – Estate Planning

Fundamentals of Estate Planning, 11th edition, Fontaine, The American College Press, 2008, ISBN 1932819576

PFP 6 – Personal Financial Planning Capstone Course (Cases)

2009-2010 Personal Financial Planning: Cases and Applications, 6th edition, Kaplan-Schweser, 2009, ISBN 9781427780034, www.schweser.com/cfp/req_education/nov/

