

# Financial Planning Teaching Seminar

**Start your journey** as an adjunct faculty member or enhance your teaching ability in financial planning through intensive instruction by renowned financial planning faculty.

**2020 Dates**

Summer August 17–19

## Overview

**Offered on Columbia University's Morningside campus** in New York City, this experience based Financial Planning Teaching Seminar is offered jointly between Columbia University School of Professional Studies and the CFP Board Center for Financial Planning. The seminar will focus on both financial planning content as well as basic instructional design, using learning objectives, student assessment, and avenues of bringing experiential learning into the classroom or online learning platform.

Faculty within finance and accounting, CFP® professionals hoping to begin a full or part-time career teaching in a CFP Board Registered Program, current faculty within all CFP Board Registered Programs, and doctoral students aspiring to begin a career preparing the next generation of CFP® professionals are invited to participate.

This teaching seminar presents current and prospective faculty with a wonderful opportunity to sharpen their teaching abilities, and it provides access to a library of teaching resources that will enhance instruction within a variety of program types and delivery formats.

For additional information, please contact us at [sps-academicadmin@columbia.edu](mailto:sps-academicadmin@columbia.edu)

## Schedule Overview

*Schedule overview is subject to change. Onsite sessions will run 9:00 a.m. to 5:00 p.m. and include daily lunch and breaks*

### Online Pre-Work

(approx. 1 month prior to onsite seminar)

Fundamentals of Financial Planning  
Program Development and Leadership

### Onsite Seminar

(Monday–Wednesday)

Insurance  
Retirement Planning  
Estate Planning  
Taxation  
Investments  
Online Follow-Up

### Online Follow-Up

Teaching Resources

## Tuition

**Total Program Fee**  
\$2,900 per person

**Early-bird Fee**  
\$2,500 per person

**Group Fee**  
For groups of 3 or more,  
the cost is \$2,250 per person

*Early-bird for August 17–19  
seminar available until May 1, 2020*