

ESSENTIAL COURSES FOR EARNING CFP[®], ChFC[®], OR CLU[®]

Shared course requirements allow you to earn multiple designations efficiently.

CFP[®] AND ChFC[®]: These two designations share a core of seven[†] common courses. CFP[®] professionals and those who have completed the required CFP[®] certification education coursework are just one course away from ChFC[®].[†]

CLU[®], CFP[®] AND ChFC[®]: Many of the elective courses that count toward the CLU[®] are also part of the ChFC[®] program and CFP[®] education curricula. By earning the CLU[®], you may only need to complete up to four additional courses to earn the ChFC[®]. Students with the ChFC[®] or CFP[®] would only need an additional three courses to earn the CLU[®].

COURSE NAMES	CFP [®] 7 required	ChFC [®] 8 required	CLU [®] 5 required / 3 elective	CFP ^{®†} to ChFC [®] Complete 1 additional course	CLU [®] to ChFC [®] Complete up to 6 additional courses	ChFC [®] / CFP [®] to CLU [®] Complete 3 additional courses
HS 300 Financial Planning: Process and Environment	✓	✓	E		✓	
HS 311 Fundamentals of Insurance Planning	✓	✓	✓			
HS 321 Income Taxation	✓	✓	E		✓	
HS 323 Individual Life Insurance			✓			✓
HS 324 Life Insurance Law			✓			✓
HS 326 Planning for Retirement Needs	✓	✓	E		✓	
HS 328 Investments	✓	✓	E		✓	
HS 330 Fundamentals of Estate Planning	✓	✓	✓			
HS 331 Planning for Business Owners and Professionals			✓			✓
HS 333 Personal Financial Planning: Comprehensive Case Analysis	✓	✓			✓	
HS 347 Contemporary Applications in Financial Planning		✓		✓	✓	

[†] Students who hold an active CFP[®] certification only need to complete Course HS 347 in order to earn the ChFC[®] designation.

