



THE
**AMERICAN
COLLEGE**
OF FINANCIAL SERVICES®

ChFC®

Chartered Financial Consultant®

Financial planning for today's complexities

TheAmericanCollege.edu/ChFC



Why Become a ChFC®?

Distinguish yourself with applied financial planning knowledge to serve a wide variety of client needs.

Becoming a ChFC® gives you the ability to:

- ✓ Demonstrate mastery of financial planning knowledge
- ✓ Serve diverse needs including those with special needs and their caregivers, complex family situations, clients transitioning through divorce, and more
- ✓ Apply financial planning theory and implement effective techniques
- ✓ Succeed as an ethical, competent, and articulate practitioner

“Every professional in the industry needs to have this designation. Not only is the material critical to know, but it will add more value to your name.”

Alan Naguit, ChFC®

ChFC® designees report

32%

higher growth in earnings than advisors without a designation¹

¹ FUSE Research Network. The American College of Financial Services Designation Outcomes Study. 2024. Study covers a three-year period.



Your Differentiator: Applied Financial Planning Knowledge

The College's ChFC® Program offers comprehensive education in the essentials of financial planning, including insurance, taxation, retirement, and estate planning. It also addresses advanced areas such as behavioral finance, non-traditional family structures, and small business planning.

The program features:



Essential competencies in tax and retirement planning, special needs advising, wealth management, and more



Focus on modern and niche financial planning to broaden your professional and practice reach



Elite faculty of nationally-recognized academics and researchers in financial planning



Flexible or more structured learning model



Growing network of over 50,000 ChFC® professionals nationwide

ChFC®
designees
report

75%

higher client retention
than advisors with no
designation²

¹ FUSE Research Network. The American College of Financial Services Designation Outcomes Study. 2024. Study covers a three-year period.

ChFC® Program at a Glance

The ChFC® is intended for advisors who want to go above and beyond foundational financial planning knowledge, delivering sound guidance to satisfy diverse client needs. To earn the designation, you must complete a total of eight required courses, the seven also included in The College's CFP® Certification Education Program and a course on contemporary applications in estate planning, divorce, business succession, and more.

Tuition \$6,545	Timing Complete in as few as 18 months
Format 100% online, self-study	
Your Learning Outcomes • Understand the basics of financial planning and risk management • Income tax strategies for individuals, small businesses, non-traditional families, and more • Retirement planning, investing, and estate planning formulas for success • Expertise in special needs planning, gift planning and inheritance, insurance, and more	
Tuition Savings and Scholarship Opportunities Program tuition can be paid on a per-course basis, or packaged together at a reduced rate. Tuition covers your course fees, final exam, and course materials. Scholarship opportunities for qualifying groups are available. Learn more at TheAmericanCollege.edu/Scholarships	

Your Educational Journey Starts Here

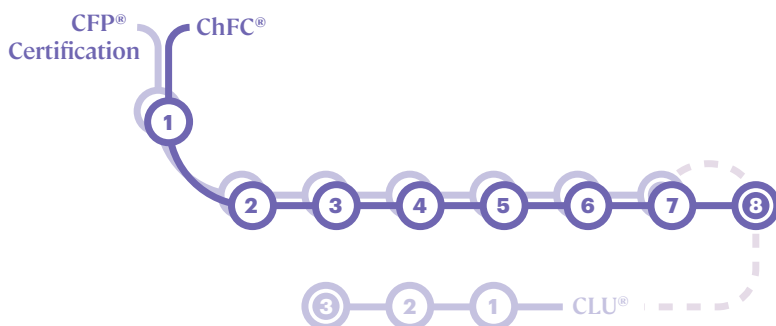
There are no prerequisite courses required before you can begin the ChFC® Program, but to use the designation, you are required to have three years of full-time, relevant business experience and a high school diploma or the equivalent. To receive and maintain the ChFC® designation, you must:

- Agree to comply with The American College Code of Ethics and Procedures
- Participate in the annual Professional Recertification Program (PRP) to maintain the designation

Your Roadmap to Success

Your learning journey doesn't have to begin or end with earning your ChFC® designation. The ChFC® can be pursued as a stand-alone designation or earned in combination with the CFP® certification or CLU®. Either way, it's an integral component of a lifelong learning journey with The American College of Financial Services.

Here are a few potential paths:



By earning your ChFC®, you're also able to complete The College's requirements for our CFP® Certification Education Program and sit for the CFP® exam. ChFC® completers can earn their CLU® with just three additional courses.

Expertise For Every Stage

The American College of Financial Services delivers applied financial knowledge and education, promotes lifelong learning, and advocates for ethical standards for the benefit of society.

As a lifelong learning partner, you will benefit from:

- Extensive professional network of one-in-five financial advisors educated by The College
- Ready-to-use knowledge delivered by plugged-in, industry-leading experts
- Interactive community engagement featuring frequent webinars, conferences, and professional development events
- Advanced planning skills and real-world application not delivered elsewhere
- Modern education through the latest in mobile-friendly, e-learning technology
- Prestigious pedigree and client recognition from nearly 100 years of academic excellence

ChFC[®]

Chartered Financial Consultant[®]

TheAmericanCollege.edu/ChFC

866-796-2204

The mark of ChFC[®] is the property of The American College of Financial Services and may be used by individuals who have successfully completed the initial and ongoing certification requirements for this designation. The College can disallow use of the ChFC[®] if advisors do not adhere to the program's ethical standards, continuing education, and other requirements.



The American College of Financial Services
630 Allendale Road, Suite 400
King of Prussia, PA 19406