CAREER FORWARD

CENTER FOR BUSINESS AND TECHNOLOGY

Summer 2012

Stay competitive in today's changing economy.

www.pace.edu/cbt

PACE UNIVERSITY

Work toward greatness.

Designed by businesspeople for businesspeople

Why become a CERTIFIED FINANCIAL PLANNER™?

Financial planning is one of the fastest growing career paths and the CFP® certification is one of the most recognized and sought-after certifications. In a tight economy, people want to be assured that they are investing with a credible, qualified professional, and those with a CFP® certification will stand out.

Whether you are interested in starting a rewarding career or trying to give the one you have a boost, becoming a CFP® professional can help give you the edge you need.

Why Pace?

- **A flexible program designed for the working professional**—Take courses **part-time,** and in any order you prefer, to fit your busy schedule OR **fast track** your education to **finish in as little as three semesters**.
- **Transfer courses from other institutes**—If you've completed any of the CFP® certification modules with other institutions, you can apply that to a Pace certificate.
- **Start immediately, with no prerequisites**—Unlike other institutions with yearly modules, at Pace you can start any semester.
- **Conveniently located—**Courses are offered at our White Plains Graduate Center, within walking distance to the Metro North train station; our Midtown Center; and our downtown New York City Campus, in the heart of the financial district and steps away from multiple subway and bus lines.
- **Support services that take you from the classroom to the boardroom**—Pace students can benefit from our multiple services, like our Career Services Department, which is the largest of its kind in the New York Metropolitan Area. With a dedicated career counselor and access to a proprietary database of job listings, Pace gives you an edge that other institutions don't.
- **Developed and taught by leaders in the field**—Our instructors are all working in their field, bringing their professional experience and connections to the classroom.
- **A century of experience and excellence**—Pace was founded more than 100 years ago with the working professional in mind, offering evening courses to aspiring accountants. Today, those decades of business experience and financial expertise still apply, providing our students with a broad and established network of resources.

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FINANCIAL PLANNING CERTIFICATE PROGRAM

Pace's Center for Business and Technology offers a Financial Planning Certificate Program that prepares you to take the national CFP® Certification Examination administered by the Certified Financial Planner Board of Standards. Our Financial Planning Program graduates often achieve a high pass rate on the certification exam. Courses are taught by industry experts, active CFP® Professionals, CPAs, and attorneys.

Where can your CFP® certification take you?

- Financial Planning
- Technical Financial Plan Development
- Client Relationship Manager
- Broker/Dealer Positions
- Retirement Planning
- Financial Education in the Workplace
- Investment Analyst
- Insurance Analyst
- Estate Planning
- Debt Counseling
- Divorce Counseling
- Academics
- And so many more...

Classes commence the week of **June 18, 2012**

Learn more about the Pace curriculum and career opportunities as a CERTIFIED FINANCIAL PLANNER™ professional in the corporate environment and private practice.

Attend an Information Session today!

INFORMATION SESSIONS

Midtown Center
Thursday, May 31, 2012
6:00 p.m.–7:00 p.m.
Pace University
551 Fifth Avenue
New York, NY 10176

White Plains Graduate Center
Wednesday, May 30, 2012
6:00 p.m.–7:00 p.m.
Lubin Graduate Center
One Martine Avenue
White Plains, NY 10606

Contact us at cpe@pace.edu, (800)727-2238, or www.pace.edu/cbt

Call **(914) 422-4334** or **1-800-727-2238** for details!
www.pace.edu/cbt

FINANCIAL PLANNING
CERTIFICATE PROGRAM

Advance your career with one or more of these interesting classes. CFP 0101–CFP 0106 meet once a week for 10 weeks. 6:00 p.m.–9:00 p.m.

Tuition:
Early Registration: $621.00
After **June 1, 2012**: $690.00

Fundamentals of Financial Planning (CFP 0101)

A comprehensive overview of critical topics in the field, such as data gathering and analyzing information, making recommendations, and writing, implementing, and reviewing a plan. Topics include: regulations affecting financial planners; basic financial planning concepts such as the time value of money; the economic environment; ethical; professional, and legal considerations; budgeting; forms of business ownership; and how to address inflation/volatility in financial plans.

Mondays, June 18–August 20, 2012
White Plains
Course Reference #90459

Tuesdays, June 19–August 21, 2012
Midtown Center
Course Reference #90465

Insurance Planning (CFP 0102)

Master the principles of insurance planning including life, health, disability, homeowners, auto, and other property and liability insurance. Topics include: determining the amount and type of life insurance a client needs using a time value of money process, specific factors used to evaluate and select an appropriate type of life insurance, group insurance versus individual forms of insurance, Social Security, and insurance industry regulation.

Tuesdays, June 19–August 21, 2012
White Plains
Course Reference #90460

Thursdays, June 21–August 23, 2012
Midtown Center
Course Reference #90466

Investment Planning (CFP 0103)

Have the fundamentals of investment planning at your fingertips. Topics include: mechanics of investing in security markets, tax considerations, information sources, risk investments (stocks, bond, mortgage-backed securities, options, futures, CDs, etc.), marketability and liquidity, measuring of investment return, portfolio construction, and management.

Tuesdays, June 19–August 21, 2012
Midtown Center
Course Reference #90467

Wednesdays, June 20–August 29, 2012
White Plains
Course Reference #90461

Income Tax Planning (CFP 0104)

Become an expert in the field of income tax planning. Topics include: individual income tax fundamentals, tax planning, tax aspects of investing in limited partnerships, tax implications of property transactions, family tax planning, tax advantaged investments, divorce and marital separation tax implications, tax accounting and calculations, charitable contributions, deferred compensation (qualified and non-qualified), and Alternative Minimum Tax.

Tuesdays, June 19–August 21, 2012
White Plains
Course Reference #90462

Wednesdays, June 20–August 29, 2012
New York City
Course Reference #90456

FINANCIAL PLANNING
CERTIFICATE PROGRAM

Retirement Planning and Employee Benefits (CFP 0105)

Nothing is more critical to clients in today's market than retirement and benefit planning. Topics include: the fundamentals of retirement planning and employee benefits plans, including the specific provisions of qualified retirement plans, money purchase, profit-sharing with 401(K) provisions defined benefit and target benefit plans, IRAs, and SEPs; recommending a specific qualified plan for a client; basic characteristics of employee benefits including group life insurance, group health coverage, and non-qualified deferred compensation; and the income tax impact of benefits to both the employer and the employee.

Mondays, June 18–August 20, 2012
White Plains
Course Reference #90463

Tuesdays, June 19–August 21, 2012
New York City
Course Reference #90457

Each class qualifies for 30 Continuing Professional Education (CPE) credits.

Estate Planning (CFP 0106)

Master the fundamentals of the estate planning process. Topics include: the principles of estate and gift taxation; pitfalls and weaknesses; the concept of a unified transfer system; techniques to plan a client's estate; features of trusts, property ownership, and marital and charitable considerations; intra-family transfers; life insurance; gifts; and post-mortem planning techniques.

Thursdays, June 21–August 23, 2012
New York City
Course Reference #90458

Thursdays, June 21–August 23, 2012
White Plains
Course Reference #90464

NEW! Capstone in Financial Planning (CFP 0107)

A competency-based course allowing the financial planning student to demonstrate the ability to integrate and apply his or her knowledge of financial planning topics, as received through the six-course financial planning certificate program. **Qualifies for 45 CPE credits.**

Thursdays, June 21–August 30, 2012
Midtown Center
Course Reference #90468

CFP 0107 meets once a week for 12 weeks.
6:00 p.m.–9:00 p.m. first 3 sessions
6:00 p.m.–10:00 p.m. last 9 sessions

Tuition for CFP 0107
Early Registration: $652.50
After **June 1, 2012**: $725.00

CFP® EXAM REVIEW

Be prepared. Be confident. Take the stress out of the CFP® exam with our intensive five-day program.

Pace's expert instruction and exam simulations help students master the core information included in the CFP® certification exam. This intensive program provides a comprehensive overview of study concepts and cases corresponding to the 78 topics tested on the exam, focusing on the six distinct areas of financial planning. It also gives students tips on approaching test questions, maximizing their study time, and streamlining test taking. Help ensure success on this important examination with our convenient five-day program.

This five-day program meets Monday through Friday at the White Plains Graduate Center.

July 9–13, 2012
9:00 a.m.–5:00 p.m.

Tuition: $799.00

CFP® Exam Review (CFP 0108)

Course Reference #90379

Topics and schedule:

- General Principles of Financial Planning
  Monday
- Insurance and Investment Planning
  Tuesday
- Income Tax Planning
  Wednesday
- Estate Planning
  Thursday
- Retirement Planning
  Friday

Materials:

Pre-reading of the Keir CFP® Exam Review materials is strongly suggested, as the presentations will focus primarily on the 78 topics encompassed in the Keir materials. It is recommended that participants **order and read the following materials prior to class**: the Keir Review Basic Package (Case Study Workbooks, Certification Examination Workbooks Volumes 1 and 2); the Time Value Handbook; and the Simulated Exam Book.

Process:

Lead instructor Paul Rivera, PhD, has been teaching the CFP® Exam Review program for more than 20 years. He is a past member of the CFP Board of Examiners and Item Writing Committee as well as former Director of the Personal Financial Planning Program at Albertus Magnus College. Participants should be prepared with materials for taking notes and have studied the Keir Review materials. Participants will work on application questions following the corresponding discussion topics. Participants should be familiar with the HP-12C or HP10bII financial calculator (HP-12C most common) and are encouraged to previously study any published CFP® Exam Review Materials and Time Value concepts.

Call **(914) 422-4334** or **1-800-727-2238** for details!
www.pace.edu/cbt

FINANCIAL CALCULATOR WORKSHOP

Become proficient in this vital tool of the trade.

Financial Calculator Workshop (CFP 0100)

Our one-day workshop is an overview of formulas and functionality keys associated with the HP12C and HP10bII financial calculators.

This workshop meets on Saturdays 10:00 a.m.–4:00 p.m.

Tuition: $140.00

NEW YORK CITY CAMPUS

Saturday, June 30, 2012
Course Reference #90453

WHITE PLAINS GRADUATE CENTER

Saturday, June 16, 2012
Course Reference #90454

Saturday, June 23, 2012
Course Reference #90455

New courses being offerered all the time! Check our website at **www.pace.edu/cbt.**

ACCOUNTING COURSES

Courses for Busy Lawyers and Accountants

Being at the top of your game can give you an edge in the field. Our accounting workshops will update essential skills. All courses are held on Pace's New York City Campus.

Fraud and Forensic Accounting (ACCT 0120)

What is fraud? How is it uncovered? What can you do to avoid fraud? Tackle these and other critical issues in this one-day workshop.

Tuesday, May 15, 2012
9:00 a.m.–4:00 p.m.
Course Reference #90273

Tuition: $295.00

Current Regulatory Requirements in the Accounting Environment

Day 1

- IFRS vs. GAAP
- Governmental and Not-for-Profit Accounting

Current Regulatory Requirements in the Accounting Environment

Day 2

- Mergers and Acquisitions
- Cases in Fradulent Financial Reporting

Call **(914) 422-4334** or **1-800-727-2238** for details!
www.pace.edu/cbt

SPECIALTY COURSES* AND FACULTY

Advance your career in these targeted specialties. One-day Saturday workshops meet from 9:00 a.m.–4:00 p.m.

Elder Law and Planning (ELD 0110)

Master the basics of estate laws to create plans that will meet the needs of the aging person.

Qualifies for 6 CPE Credits

Saturday, May 12, 2012
Course Reference #90282

Saturday, July 14, 2012
Course Reference #90210

Tuition: $199.00

Commercial Leases (RE 0120)

A comprehensive review of the most important terms of the lease. Topics include: rent, use, escalation charges, assignment and subleases, alterations and repairs, and renewal of lease.

Saturday, June 2, 2012
Course Reference #90283

Tuition: $199.00

Rent Regulation in New York (RE 0121)

Gain critical insight into the complex field of rent control and rent stabilization systems.

Saturday, May 19, 2012
Course Reference #90284

Tuition: $149.00

How to Purchase and Sell Your Home (RE 0122)

The purchase and sale of your home is one of the important financial decisions you will make in your life. This course will allow you to make informed choices by covering real estate law and practices.

Saturday, June 9, 2012
Course Reference #90427

Saturday, July 28, 2012
Course Reference #90353

Tuition: $125.00

* All courses held on Pace's NYC Campus

Learn from our top notch faculty who bring their years of experience in the field into your classroom.

Andrew Ferrera, CPA, is a Securities Regulation Director with an examination, public accounting, and teaching background. He has expertise in SEC, NYSE, and FINRA rules and regulations and strategic analytical and risk assessment audit skills, and is committed to investor protection.

Ryan Lewis, CFP®, CFS, CFMC, is a Senior Vice President at Smith Barney, leading a team that oversees $500 million in assets for about 200 families. Lewis holds several professional designations including: CFP®, Certified Fund Specialist (CFS), and Certified Mutual Fund Counselor (CMFC), as well as several securities industry licenses.

Julia A. Peloso, CFP®, Accredited Domestic Partnership Advisor℠, and a Chartered Retirement Planning Counselor℠, has worked with clients to help them achieve their financial aspirations since 1984. Julia is currently a Vice President with a leading global financial services firm.

Paul A. Rivera, PhD, has a doctorate in finance and international business and more than 25 years of experience teaching financial planning, financial analysis, marketing, managerial accounting, insurance, employee benefits, and investment analysis. Rivera is currently Executive Director of PAR Enterprises, a consulting practice and licensed insurance producer.

Laurel Stauffer-Daly, CLU, ChFC, LUTCF, teaches at Pace University, the New York Center for Financial Studies, St. John's University, Baruch College, and various community colleges. She has served as a consultant to numerous *Fortune* 500 financial companies and has appeared on Fox 5 News and local radio as an insurance expert.

IN COOPERATION WITH TPG SEMINARS

Tax Preparer Ethics (2 hours)

This course will cover ethics for the tax preparer as required by IRS Regulations. Included will be preparer registration as required, conflict of interest, standards with respect to tax returns and other documents, and tax preparer's responsibilities. Also included for the tax preparer will be competence and proper conduct, best practices, required disclosures, due diligence, and rules as promulgated under IRS Circular 230. We will present privacy restrictions on disclosure of client information by tax preparers and appropriate permissions.

Federal Tax Law Updates (3 hours)

This course will present changes and updates to the tax law and IRS procedures. We will review the latest tax cases and IRS rulings with emphasis on tax strategies. Topics will include tax legislation issues and updates to IRS procedures. Also included will be updates on employment taxes, retirement plans, fringe benefits, and other relevant tax law changes.

New York State Law Updates (3 hours)

This course will present changes and updates to the tax law and New York State procedures. We will review the latest cases and state rulings affecting all tax preparers, with an emphasis on tax strategies for their clients. Topics will include discussion on state tax legislation issues and updates to all state procedures. Also included will be updates on employment taxes, retirement plans, fringe benefits, and other relevant state tax law changes.

Wage and Non-Business Tax Topics (5 hours)

This seminar will focus on the wage and non-business tax topics including forms that are used in this area of tax preparation. Included will be various types of income and how to report them, types of credits that are available and how to claim them, as well as types of expenditures that are deductible. Also included will be information and presentations on unreported tip income, bartering, tax information authorization, direct deposits, and tax payment methods, injured spouse coverage, and higher education expenses, etc.

Wage and Small Business Tax Topics (5 hours)

This seminar will cover all types of income from small business with detailed discussion on all applicable forms including schedules C, E, F. Also included will be discussion and material on foreign income exclusion, foreign tax credit, estimated tax requirements, and income for small businesses including K-1s.

* Classes will be held on Pace's Westchester and New York City campuses.

Call **(914) 422-4334** or **1-800-727-2238** for details!
www.pace.edu/cbt

ABOUT PACE'S CENTER FOR BUSINESS AND TECHNOLOGY

A top-quality education

Pace has been ranked among the top business schools in the country by *U.S. News and World Report* and Forbes.com recently cited Pace as one of the top 20 "colleges that will make you rich."

Pace's Career Services Department is one of the most comprehensive in the region and home to the largest internship program in Metropolitan New York. During the program, participants will have full access to Pace Career Services including a private database of job postings, one-on-one career counseling, workshops, resume building, and interview skills development.

The Pace University Center for Business and Technology

The Center for Business and Technology is a proven leader in the specialized field of mandatory continuing education for business professionals, providing the highest quality courses in conjunction with the requirements mandated by regulators. The Center spearheads the development of quality courses, designed to specifically meet the educational objectives of major corporations and financial institutions in the business community and is run by Director Sylvia Russakoff. As a licensed and registered sponsor of continuing professional education, the Center assists CPAs in meeting mandatory CPE requirements by offering a variety of in-depth programs specifically designed to meet their needs.

Course accommodations for students with disabilities

The University's commitment to equal educational opportunities for students with disabilities includes providing reasonable accommodations for the needs of students with disabilities. To request an accommodation for a qualifying disability, a student must self-identify and register with the Coordinator of Disability Services for his or her campus. No one, including faculty, is authorized to evaluate the need for or grant a request for an accommodation except the Coordinator of Disability Services. Moreover, no one, including faculty, is authorized to contact the Coordinator of Disability Services on behalf of a student. For further information, please see Information for Students with Disabilities on the University's web site.

PACE UNIVERSITY PROGRAM LOCATIONS

New York City Campus
One Pace Plaza
New York, NY 10038

White Plains Graduate Center
One Martine Avenue
White Plains, NY 10606

Midtown Center
551 Fifth Avenue
New York, NY 10176

For directions to campus, visit www.pace.edu/directions.

Call **(914) 422-4334** or **1-800-727-2238** for details!
www.pace.edu/cbt

SUMMER 2012 REGISTRATION

You may register by fax, via U.S. mail, or online. **Payment is due at time of registration.**

To Register:

Fax: Fax your completed registration and payment information to **(914) 989-8615**.

By Mail: Send your completed registration and payment to:
Pace University, Center for Business and Technology
One Martine Avenue, Room 424
White Plains, NY 10606

Online: **www.pace.edu/cbt**

NAME ____________________
First *Middle Initial* *Last*

D.O.B. ____ / ____ / ____ U# or SSN ____________________
Month *Day* *Year* *(Last four digits are required)*

HOME ADDRESS ____________________

____

CITY ____________________ STATE ________ ZIP ________

TELEPHONE (Office) ____________________ (Home or Cell) ____________________

E-MAIL ____________________

Please Indicate Method of Payment:
[ ] **Check/money order** enclosed made out to **Pace University**
[ ] **Credit card** [ ] Visa [ ] MasterCard [ ] Discover [ ] American Express

ACCOUNT NUMBER ____________________

CARD EXPIRATION DATE ____________________

SIGNATURE OF CARDHOLDER ____________________

TODAY'S DATE ____________________

COURSE NUMBER	COURSE NAME	LOCATION	COURSE DATE	TUITION
		MT NYC WP		$
		MT NYC WP		$
		MT NYC WP		$
		MT NYC WP		$
				TOTAL $

Refund and cancellation policy: Registrants who cancel their registration by the **Wednesday** of the **week prior** to the start of course will receive a full refund. **No refunds will be granted after that date**. Pace University reserves the right to substitute instructors, change the day or time a program meets, or cancel programs due to insufficient enrollment or unforeseen events. If a course is canceled, a FULL refund will be issued.

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Here Is Your Opportunity To Succeed!

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