CERTIFICATE PROGRAM FOR FINANCIAL PLANNERS
TEXTBOOK LIST
Fall 2009

Textbooks can be purchased at Barnes and Noble at BU, located at 660 Beacon Street, 4th floor, Boston or via the web at http://bu.bkstore.com. Please call the bookstore at (617) 267-8484 to confirm that books have arrived.

If your books are purchased from the Barnes and Noble at BU, you may be able to sell them back to the bookstore at the end of the semester. Please contact the bookstore directly at the end of the semester for information.

Note: AN HP12C CALCULATOR IS REQUIRED FOR ALL COURSES

FP101 - Introduction to Financial Planning

Dalton, Personal Financial Planning Theory and Practice, 5th ed. ISBN 978-1-4-2776990-9

(**Note:** This book can also be purchased through the publisher directly by calling 1-888-694-3568)

FP102 - Risk Management

Dorfman, *Introduction to Risk Management and Insurance*, 9th ed. ISBN: 978-0-1-32242271

FP103 - Investments

Mayo, *Investments: An Introduction (Thomson ONE - BSE)*, 9th ed.

FP104 - Tax Planning

Pope, *Prentice Hall's Federal Taxation 2010: Individuals,* 23rd ed.

FP105 - Retirement Planning & Employee Benefits

Dalton, *Retirement Planning and Employee Benefits for Financial Planners,* 5th ed.
CCH, *2009 Social Security Benefits including Medicare* (optional)

FP106 - Estate Planning

Fontaine, *Fundamentals of Estate Planning,* 11th ed.
CCH, *2009 US Master Estate & Gift Tax Guide* (optional)

FP110 – Case Study and Review

Kaplan-Schweser, *2009-2010 Personal Financial Planning Cases and Applications,* 6th ed.
ISBN: 978-1-42778-003-4

(**Note:** This book can be purchased through the publisher directly by calling 1-888-694-3568 or by visiting http://www.schweser.com/cfp/req_education/nov/)

* The Keir Summary and Multiple Choice books are **optional** reading for FP101 through FP106. These materials are not available in the bookstore, but can be purchased directly from Keir at www.Keirsuccess.com.