



College for
Financial Planning®
EDUCATING THE NATION'S TOP FINANCIAL ADVISORSSM

2017 Annual Report
**Graduate Degree Program:
Graduate Survey**

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Introduction

Although the College distributes evaluations to collect information on individual courses and instructors, the Office of Institutional Research and Effectiveness (OIRE) felt it would be beneficial to obtain the opinions of the master's graduates regarding the programs as a whole. This survey focuses on bigger picture items such graduates' prior learning experience, if they felt the program provided applicable skills for their career, and their relationships with faculty, staff, and the other graduates. The primary objectives of this survey include learning why graduates selected the College, how well the College contributed to their learning experience, their connection with other graduates and faculty, and overall satisfaction with the graduate degree program. Knowing how students feel about these topics will assist the College with developing ways to provide the best possible learning experience for students.

Method

Approximately 1-2 weeks after the end of each graduate degree program cycle, a survey link within the graduate audit e-mail is sent to graduates by the Registrar. In 2014 and 2015, the survey was presented to graduates as part of the graduation requirement, but they had the ability to opt-out. Starting in 2016, the graduates were simply requested to complete the survey without any requirement related to graduation which led to a lower response rate, and the findings in this report are only representative of those graduates who had an interest in completing the survey. Participants were asked to respond to several of the items on a Likert-type scale ranging from 1 to 5 in order to calculate the mean scores. Items that use a different range are noted above the respective tables within the document. In addition, graduates are able to provide comments regarding their course(s), instructor(s), materials, support staff, and the technology. A total of 44 responses out of 84 graduates (52.4%) were collected for 2017. Detailed tables within this report break down specific items regarding student relationships, faculty and staff relationships, and satisfaction with the program and College. A summary of the tables is provided for each category.

Survey Results

The total number of graduates is based on the STARS report Registrar – Program Graduate Listing.

Table 1

<i>Number of Respondents for each cycle</i>						
	1701	1702	1703	1704	1705	Total
Total number of graduates	15	16	11	20	22	84
Number of respondents	8	11	4	12	9	44
Response percentage	53.3%	68.8%	36.4%	60.0%	40.9%	52.4%

Student Program Information

The majority of the graduates who responded were enrolled in the Personal Financial Planning major (88.6%) which is the result of a fair number students who completed the CFP® professional education program through the College and articulated those courses toward the Personal Financial Planning major.

Table 2

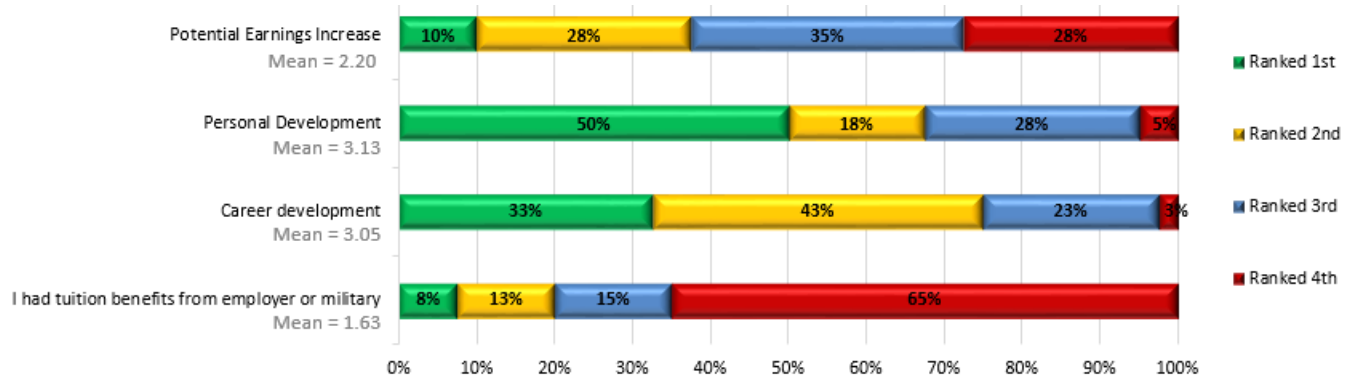
<i>Please indicate your major in the Graduate Degree Program:</i>						
	1701	1702	1703	1704	1705	Total
Personal Financial Planning	6	10	4	11	8	39
	75.0%	90.9%	100.0%	91.7%	88.9%	88.6%
Finance	2	1	0	1	1	5
	25.0%	9.1%	0.0%	8.3%	11.1%	11.4%
Total	8	11	4	12	9	44

Table 3

<i>What certificates did you earn while pursuing your graduate degree? (select all that apply)</i>						
	1701	1702	1703	1704	1705	Total
Personal Financial Planning Certificate	2	4	3	6	6	21
	25.0%	36.4%	75.0%	50.0%	66.7%	47.7%
Financial Analysis Certificate	2	0	0	0	1	3
	25.0%	0.0%	0.0%	0.0%	11.1%	6.8%
None	4	7	1	6	2	20
	50.0%	63.6%	25.0%	50.0%	22.2%	45.5%
Total	8	11	4	12	9	44

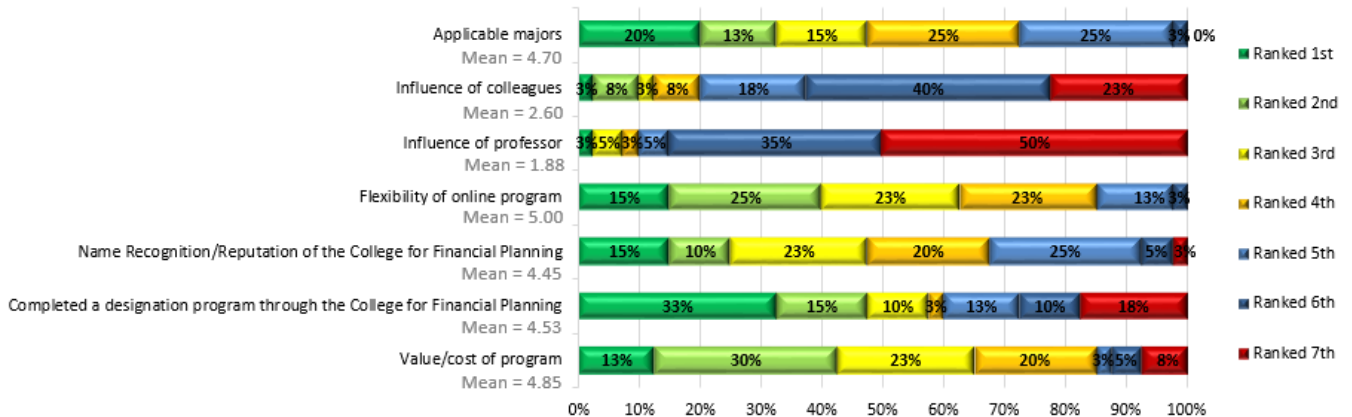
Graduates are asked to rank four reasons as to why they decided to earn a graduate degree with 1 being the primary reason to 4 being the last. To more easily determine which options graduates are selecting, the rankings were assigned numeric values, as follows, to calculate a mean score: Ranked 4th (1.00), Ranked 3rd (2.00), Ranked 2nd (3.00), Ranked 1st (4.00). Out of the four available reasons for enrolling in a graduate degree program, the highest percentages for the first two choices were 50% of graduates ranked *personal development* 1st and 43% ranked *career development* 2nd.

Figure 1. Rank your reasons for why you decided to earn a graduate degree (1 = most important reason, 4 = least important reason).



Graduates are asked to rank seven reasons as to why they selected the College for Financial Planning with 1 being the primary reason to 7 being the last. To more easily determine which options graduates are selecting, the rankings were assigned numeric values, as explained above. The highest percentages for the first two choices showed that 33% of the graduates selected *Completed a designation program through the College for Financial Planning* as their 1st choice and 30% of graduates selected the *value/cost of program* as their 2nd choice.

Figure 2. Rank your reasons for choosing the College for Financial Planning for your graduate degree (1 = most important reason, 7 = least important reason).



Experience in the Program

The following questions relating to graduates' experience in the graduate degree program display survey results from the previous two fiscal years to demonstrate which areas are improving and which still need work. Figure 3 and Table 5 show mean scores and standard deviations for the question, "To what extent has your experience as a graduate student at the College for Financial Planning contributed to your knowledge, skills, and personal development in the following areas?"

Knowledge, skills, and personal development

Figure 3. To what extent has your experience as a graduate student at the College for Financial Planning contributed to your knowledge, skills, and personal development in the following areas?

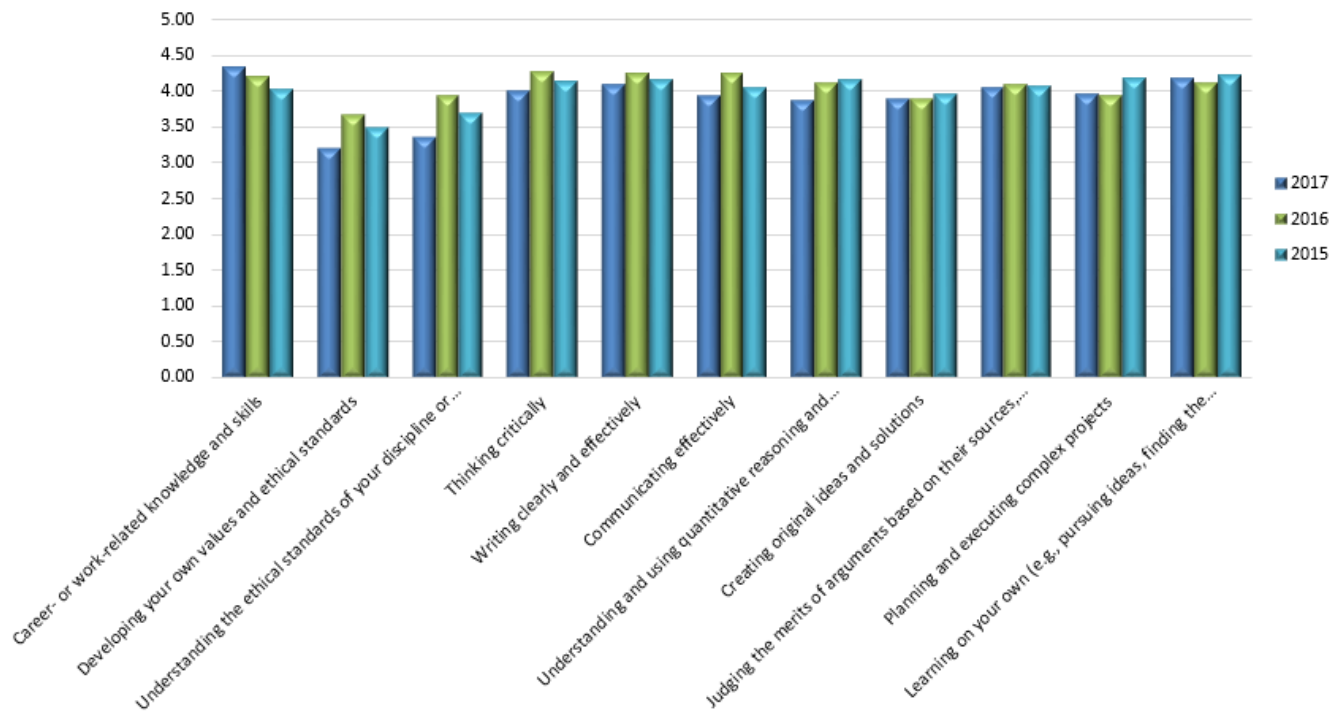


Table 5

To what extent has your experience as a graduate student at the College for Financial Planning contributed to your knowledge, skills, and personal development in the following areas? (1 – None to 5 – Very much)

	1701 N=5	1702 N=11	1703 N=4	1704 N=11	1705 N=9	2017 N=40	2016 N=26	2015 N=77
In-depth knowledge of subjects important to your major	4.60 (0.55)	4.36 (0.67)	4.50	4.46 (0.69)	4.33 (0.71)	4.43 (0.64)	4.38 (0.80)	4.30 (0.67)
Career- or work-related knowledge and skills	4.40 (0.55)	4.09 (0.83)	4.50	4.36 (0.81)	4.44 (0.73)	4.33 (0.73)	4.19 (1.02)	4.03 (0.93)
Developing your own values and ethical standards	3.60 (0.89)	2.91 (0.83)	3.50	3.09 (1.04)	3.33 (0.71)	3.20 (0.91)	3.65 (1.26)	3.49 (1.05)
Understanding the ethical standards of your discipline or profession	3.60 (1.34)	3.18 (0.75)	3.50	3.46 (1.04)	3.22 (0.83)	3.35 (0.95)	3.92 (1.09)	3.69 (1.08)
Thinking critically	4.00 (0.71)	3.91 (0.70)	4.25	3.91 (1.04)	4.11 (0.78)	4.00 (0.78)	4.27 (0.87)	4.13 (0.82)
Writing clearly and effectively	4.40 (0.55)	3.82 (0.87)	4.25	3.91 (1.22)	4.33 (0.71)	4.08 (0.89)	4.23 (0.95)	4.14 (0.87)
Communicating effectively	4.40 (0.55)	3.73 (0.65)	4.25	3.55 (1.13)	4.25 (0.89)	3.92 (0.90)	4.23 (0.99)	4.04 (0.88)
Understanding and using quantitative reasoning and methods	4.20 (0.45)	3.82 (0.87)	4.25	3.91 (0.83)	3.89 (0.78)	3.85 (0.99)	4.12 (0.95)	4.16 (0.84)
Creating original ideas and solutions	4.20 (0.45)	3.91 (0.83)	4.50	3.82 (0.75)	3.89 (1.05)	3.88 (1.00)	3.88 (1.18)	3.96 (0.91)
Judging the merits of arguments based on their sources, methods and reasoning	4.60 (0.55)	3.82 (0.75)	4.25	4.09 (0.94)	3.89 (1.17)	4.05 (0.88)	4.08 (0.89)	4.06 (0.85)
Planning and executing complex projects	4.40 (0.89)	3.55 (0.82)	4.00	4.09 (0.83)	4.00 (0.87)	3.95 (0.85)	3.92 (1.20)	4.17 (0.75)
Learning on your own (e.g., pursuing ideas, finding the information you need)	4.40 (0.89)	4.09 (0.54)	4.00	3.91 (0.94)	4.56 (0.88)	4.18 (0.81)	4.12 (1.18)	4.22 (0.75)

Student Relationships

Table 6 shows how graduates perceive the graduate students at the College, which is likely based on their interactions with others in the discussion threads as well as their opinion of themselves. The highest rated items are *Academically Honest* ($M=4.68$) and *Serious about their studies* ($M=4.58$).

Table 6

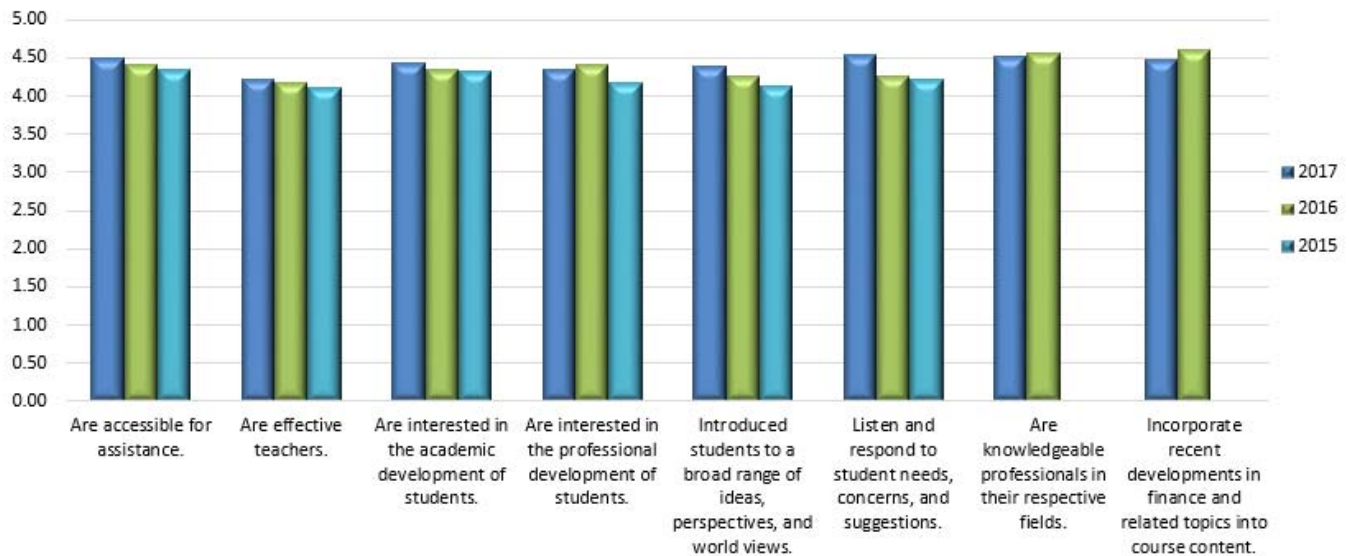
<i>Graduate students at the College for Financial Planning are: (1 – Strongly disagree to 5 – Strongly agree)</i>								
	1701 N=5	1702 N=11	1703 N=4	1704 N=11	1705 N=9	2017 N=40	2016 N=26	2015 N=77
Supportive and helpful to each other in meeting the academic demands of the program.	4.60 (0.55)	4.64 (0.50)	4.75	4.18 (0.87)	4.44 (0.73)	4.48 (0.68)	4.12 (1.03)	4.27 (0.78)
Interested in a broad range of ideas.	4.40 (0.55)	4.50 (0.53)	4.75	4.46 (0.69)	4.00 (1.00)	4.38 (0.71)	4.04 (1.04)	4.32 (0.74)
Serious about their studies.	4.40 (0.55)	4.60 (0.52)	4.50	4.73 (0.47)	4.50 (0.76)	4.58 (0.60)	4.36 (0.91)	4.45 (0.72)
Academically honest (do not cheat, plagiarize).	4.75 (0.50)	4.50 (0.53)	4.75	4.80 (0.42)	4.63 (0.74)	4.68 (0.53)	4.42 (0.97)	4.57 (0.74)
Of high intellectual quality (added in 2016)	4.40 (0.55)	4.46 (0.52)	4.50	4.46 (0.69)	4.67 (0.71)	4.50 (0.60)	4.29 (1.08)	-

Table 7 and Figure 4 list several desired aspects of faculty and the ratings given by graduates.

Table 7

<i>Graduate program faculty at the College for Financial Planning: (1 – Strongly disagree to 5 – Strongly agree)</i>								
	1701 N=5	1702 N=11	1703 N=4	1704 N=11	1705 N=9	2017 N=40	2016 N=26	2015 N=77
Are accessible for assistance.	4.40 (0.55)	4.64 (0.50)	4.25	4.55 (0.52)	4.44 (0.73)	4.50 (0.55)	4.42 (0.90)	4.36 (0.72)
Are effective teachers.	3.40 (0.89)	4.27 (0.79)	4.25	4.36 (0.67)	4.44 (0.73)	4.23 (0.77)	4.19 (0.63)	4.12 (0.82)
Are interested in the academic development of students.	4.40 (0.55)	4.46 (0.52)	4.50	4.55 (0.52)	4.33 (0.71)	4.45 (0.55)	4.35 (0.69)	4.34 (0.70)
Are interested in the professional development of students.	4.20 (0.45)	4.36 (0.50)	4.25	4.46 (0.69)	4.33 (0.71)	4.35 (0.62)	4.42 (0.64)	4.18 (0.80)
Introduced students to a broad range of ideas, perspectives, and world views.	4.20 (0.45)	4.46 (0.52)	4.50	4.55 (0.69)	4.22 (0.67)	4.40 (0.59)	4.27 (0.60)	4.15 (0.80)
Listen and respond to student needs, concerns, and suggestions.	4.20 (0.45)	4.55 (0.52)	4.25	4.82 (0.40)	4.56 (0.73)	4.55 (0.55)	4.27 (0.67)	4.22 (0.81)
Are knowledgeable professionals in their respective fields. (added in 2016)	4.20 (0.45)	4.55 (0.52)	4.50	4.82 (0.40)	4.33 (0.71)	4.53 (0.55)	4.58 (0.58)	-
Incorporate recent developments in finance and related topics into course content. (added in 2016)	4.20 (0.45)	4.46 (0.52)	4.50	4.64 (0.50)	4.50 (0.53)	4.49 (0.51)	4.62 (0.57)	-

Figure 4. Graduate program faculty at the College for Financial Planning



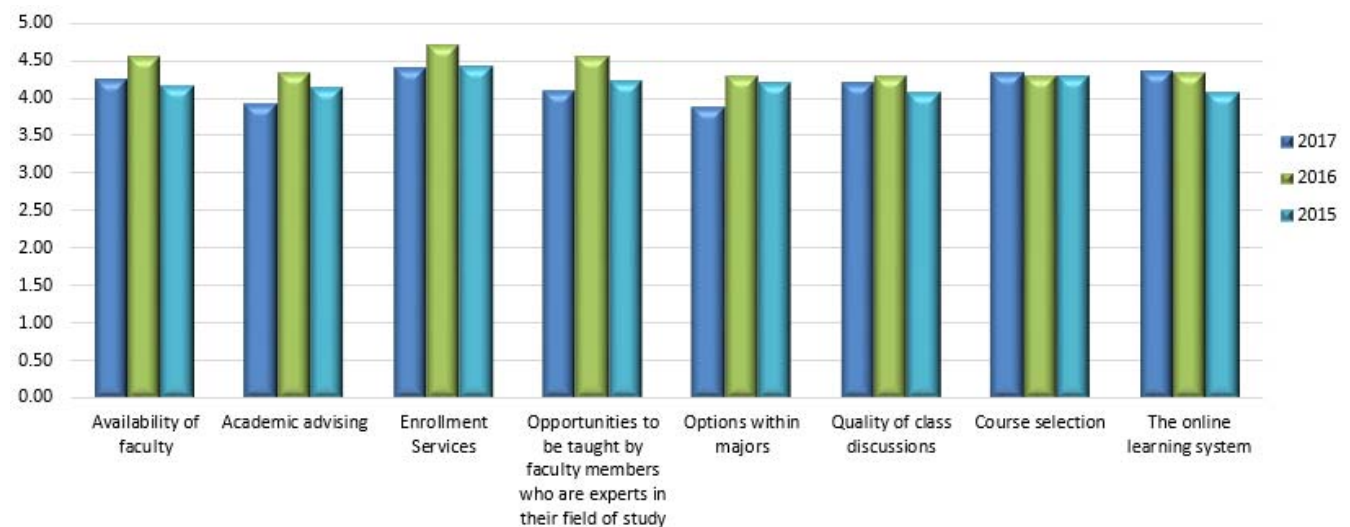
Satisfaction with the Program and College

As can be seen in Table 8 and Figure 5, graduates are generally satisfied to very satisfied with the *Online Learning System* ($M=4.38$) and with *Enrollment Services* ($M=4.43$).

Table 8

<i>Thinking about your entire graduate experience at the College for Financial Planning, how satisfied are you with each of the following? (1 – Very dissatisfied to 5 – Very satisfied)</i>								
	1701 N=5	1702 N=11	1703 N=4	1704 N=11	1705 N=9	2017 N=40	2016 N=26	2015 N=75
Availability of faculty	4.40 (0.55)	4.46 (0.52)	4.50	4.82 (0.40)	4.56 (0.73)	4.26 (1.29)	4.58 (0.64)	4.17 (0.76)
Academic advising	4.00 (0.71)	4.18 (0.87)	4.50	4.09 (1.22)	4.44 (0.73)	3.93 (1.39)	4.35 (0.94)	4.16 (0.79)
Enrollment Services	3.60 (1.52)	4.64 (0.50)	4.75	4.46 (0.93)	4.44 (0.73)	4.43 (0.87)	4.73 (0.53)	4.44 (0.62)
Opportunities to be taught by faculty members who are experts in their field of study	4.20 (0.45)	4.46 (0.69)	4.50	4.46 (0.52)	4.44 (0.73)	4.12 (1.28)	4.58 (0.58)	4.24 (0.67)
Options within majors	4.00 (0.00)	4.09 (0.94)	4.50	4.18 (0.60)	4.22 (0.83)	3.88 (1.28)	4.31 (0.79)	4.21 (0.70)
Quality of class discussions	4.00 (0.00)	4.36 (0.81)	4.50	4.00 (1.26)	4.33 (0.71)	4.23 (0.86)	4.31 (0.79)	4.08 (0.65)
Course selection	4.20 (0.45)	4.36 (0.92)	4.50	4.27 (0.65)	4.44 (0.73)	4.35 (0.70)	4.31 (0.84)	4.31 (0.61)
The online learning system	4.20 (0.84)	4.36 (0.50)	4.00	4.46 (0.69)	4.56 (0.88)	4.38 (0.70)	4.35 (0.89)	4.08 (0.83)

Figure 5



Overall, graduates who responded to the survey indicate they are very satisfied with the graduate degree program (M=4.42; see Table 9).

Table 9

<i>Overall, how satisfied have you been with your graduate education? (1 – Very dissatisfied to 5 – Very satisfied)</i>								
	1701	1702	1703	1704	1705	2017	2016	2015
	N=5	N=11	N=4	N=11	N=9	N=40	N=26	N=74
Mean score	4.80	4.64	5.00	4.82	4.67	4.42	4.50	4.46
(Standard Deviation)	(0.45)	(0.50)		(0.40)	(0.50)	(1.30)	(0.91)	(0.65)

As shown below in Table 10, graduates would probably recommend the College (M=3.44) to others looking for graduate studies. **Note that this is out of a high score of 4.00.**

Table 10

<i>Would you recommend the College for Financial Planning to others for graduate studies? (1 – Definitely No to 4 – Definitely Yes)</i>								
	1701	1702	1703	1704	1705	2017	2016	2015
	N=5	N=11	N=4	N=11	N=9	N=40	N=26	N=74
Mean score	3.60	3.82	3.25	3.82	3.67	3.44	3.62	3.59
(Standard Deviation)	(0.89)	(0.40)		(0.40)	(0.50)	(1.14)	(0.70)	(0.54)

Results shown in Table 11 indicate that graduates would probably still decide to enroll in this program if given the opportunity to start over (M=3.68). **Note that this is out of a high score of 4.00.**

Table 11

<i>If you could start over again, would you still choose to enroll in this program? (1 – Definitely No to 4 – Definitely Yes)</i>								
(question added in 2016)	1701	1702	1703	1704	1705	2017	2016	2015
	N=5	N=11	N=4	N=11	N=9	N=40	N=26	N=74
Mean score	3.60	3.73	3.75	3.82	3.44	3.68	3.65	-
(Standard Deviation)	(0.89)	(0.47)		(0.40)	(0.73)	(0.57)	(0.69)	

Employment Information

Table 12

Which of the following best describes your employment situation for the majority of your time while completing the program?

	1701	1702	1703	1704	1705	Total
Employed full time (30 or more hours per week)	4 66.7%	11 100.0%	4 100.0%	10 90.9%	8 100.0%	37 94.9%
Employed part time (less than 30 hours per week)	0 0.0%	0 0.0%	0 0.0%	1 9.1%	0 0.0%	1 2.6%
Family and other caregiving	1 16.7%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 2.6%
Unemployed	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Other	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Total	5	11	4	11	8	39

Table 13

During your graduate studies, you were able to find a balance between academic work, career and other obligations. (1 – Strongly disagree to 5 – Strongly agree)

	1701 N=5	1702 N=11	1703 N=4	1704 N=11	1705 N=8	Total N=39
Mean score	4.40	3.73	3.75	4.09	4.13	4.00
(Standard Deviation)	(0.55)	(1.27)		(1.22)	(0.99)	(1.10)

Table 14

Which of the following best describes the current state of your employment?

	1701	1702	1703	1704	1705	Total
For-profit corporation, company or group-practice	2 40.0%	3 27.3%	4 100.0%	7 63.6%	5 62.5%	21 53.8%
Self-employed in own business or professional non-group practice	1 20.0%	5 45.5%	0 0.0%	4 36.4%	1 12.5%	11 28.2%
Public institution or agency, including government, military or education	0 0.0%	1 9.1%	0 0.0%	0 0.0%	1 12.5%	2 5.1%
Not-for-profit corporation, company or group-practice	2 40.0%	1 9.1%	0 0.0%	0 0.0%	0 0.0%	3 7.7%
Family and other caregiving	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Unemployed	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Other	0 0.0%	1 9.1%	0 0.0%	0 0.0%	1 12.5%	2 5.1%
Total	5	11	4	11	8	39

Table 15

<i>Please indicate the principal industry in which you are currently employed.</i>						
	1701	1702	1703	1704	1705	Total
Financial Planning	3 75.0%	8 72.7%	3 100.0%	8 72.7%	4 50.0%	26 70.3%
Investment Planning	1 25.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	2 5.4%
Securities	0 0.0%	1 9.1%	0 0.0%	1 9.1%	1 12.5%	3 8.1%
Insurance	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	1 2.7%
Banking	0 0.0%	0 0.0%	0 0.0%	1 9.1%	0 0.0%	1 2.7%
Accounting / Taxes	0 0.0%	1 9.1%	0 0.0%	0 0.0%	0 0.0%	1 2.7%
Education	0 0.0%	0 0.0%	0 0.0%	1 9.1%	0 0.0%	1 2.7%
Other	0 0.0%	1 9.1%	0 0.0%	0 0.0%	1 12.5%	2 5.4%
Total	4	11	3	11	8	37

Table 16

<i>How many years have you been working in the industry in which you are currently employed?</i>						
	1701	1702	1703	1704	1705	Total
0-5	1 25.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	2 5.4%
6-10	1 25.0%	3 27.3%	1 33.3%	5 45.5%	1 12.5%	11 29.7%
11-15	0 0.0%	2 18.2%	0 0.0%	3 27.3%	2 25.0%	7 18.9%
More than 15	2 50.0%	6 54.5%	2 66.7%	3 27.3%	4 50.0%	17 45.9%
Total	4	11	3	11	8	37

Table 17

<i>What are your plans for employment after graduation?</i>						
	1701	1702	1703	1704	1705	Total
Have a job that will continue after graduation	4 100.0%	7 63.6%	3 100.0%	9 81.8%	8 100.0%	31 83.8%
Have a job lined up to begin after graduation	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Will begin to look for a job	0 0.0%	1 9.1%	0 0.0%	0 0.0%	0 0.0%	1 2.7%
Have a job but will begin to look for a new job	0 0.0%	2 18.2%	0 0.0%	0 0.0%	0 0.0%	2 5.4%
Pursue additional graduate education	0 0.0%	0 0.0%	0 0.0%	1 9.1%	0 0.0%	1 2.7%
Family and other caregiving	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Other	0 0.0%	1 9.1%	0 0.0%	1 9.1%	0 0.0%	1 2.7%
Total	4	11	3	11	8	37

Educational Background

Table 18

<i>Prior to starting a Master's Program at the College for Financial Planning, your highest level of education was:</i>						
	1701	1702	1703	1704	1705	Total
Bachelor's Degree	2 50.0%	4 36.4%	4 100.0%	6 60.0%	6 75.0%	22 59.5%
Post-Bachelor's Professional Certification	1 25.0%	4 36.4%	0 0.0%	2 20.0%	1 12.5%	8 21.6%
Some Graduate-Level Classes	1 25.0%	2 18.2%	0 0.0%	0 0.0%	0 0.0%	3 8.1%
Master's Degree	0 0.0%	1 9.1%	0 0.0%	2 20.0%	1 12.5%	4 10.8%
JD	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
PhD	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Total	4	11	4	10	8	37

Table 19

Prior to starting a Master's Program at the College for Financial Planning, what number of distance learning courses had you completed:

	1701	1702	1703	1704	1705	Total
I had not taken a distance-learning course before	1 25.0%	5 45.5%	1 25.0%	6 60.0%	4 50.0%	17 45.9%
1 to 3	1 25.0%	3 27.3%	1 25.0%	1 10.0%	2 25.0%	8 21.6%
4 to 6	2 50.0%	0 0.0%	0 0.0%	1 10.0%	0 0.0%	3 8.1%
7 to 9	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
More than 9	0 0.0%	3 27.3%	2 50.0%	2 20.0%	2 25.0%	9 24.3%
Total	4	11	4	10	8	37

Table 20

How did you finance your graduate education?

	1701	1702	1703	1704	1705	Total
Personal income	2 50.0%	4 36.4%	2 50.0%	6 60.0%	5 62.5%	19 51.4%
Spouse/partner/other family income	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Private student loans	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 12.5%	1 2.7%
Veteran's benefits	1 25.0%	1 9.1%	0 0.0%	1 10.0%	0 0.0%	3 8.1%
Employer sponsorship	1 25.0%	6 54.5%	1 25.0%	2 20.0%	2 25.0%	12 32.4%
Scholarship	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Other	0 0.0%	0 0.0%	1 25.0%	1 10.0%	0 0.0%	2 5.4%
Total	4	11	4	10	8	37

Demographic Information

Tables 21-24 show that of the graduates who completed the demographic portion of the survey, 77.5% are white and 83.7% males. Graduates are located all across the country and vary widely in their age ranges.

Table 21

<i>Gender:</i>						
	1701	1702	1703	1704	1705	Total
Male	5	9	4	12	6	36
	71.4%	81.8%	100.0%	100.0%	66.7%	83.7%
Female	2	2	0	0	3	7
	28.6%	18.2%	0.0%	0.0%	33.3%	16.3%
Total	7	11	4	12	9	43

Table 22

<i>Race</i>						
	1701	1702	1703	1704	1705	Total
White/Caucasian	4	8	4	8	7	31
	100.0%	72.7%	100.0%	66.7%	77.8%	77.5%
Black/African American	0	3	0	0	0	3
	0.0%	27.3%	0.0%	0.0%	0.0%	7.5%
Hispanic Non-White	0	0	0	1	1	2
	0.0%	0.0%	0.0%	8.3%	11.1%	5.0%
Hispanic White	0	0	0	0	0	0
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asian/Pacific Islander	0	0	0	1	0	1
	0.0%	0.0%	0.0%	8.3%	0.0%	2.5%
Native American	0	0	0	0	0	0
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
More than one ethnicity	0	0	0	0	0	0
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Prefer not to answer	0	0	0	2	1	3
	0.0%	0.0%	0.0%	16.7%	11.1%	7.5%
Total	4	11	4	12	9	40

Table 23

<i>What is your age-range?</i>						
	1701	1702	1703	1704	1705	Total
20 to 25	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
26 to 30	2 50.0%	2 18.2%	1 25.0%	2 18.2%	2 25.0%	9 23.7%
31 to 35	0 0.0%	1 9.1%	1 25.0%	2 18.2%	1 12.5%	5 13.2%
36 to 40	0 0.0%	1 9.1%	0 0.0%	4 36.4%	1 12.5%	6 15.8%
41 to 45	1 25.0%	1 9.1%	0 0.0%	0 0.0%	0 0.0%	2 5.3%
46 to 50	0 0.0%	4 36.4%	0 0.0%	1 9.1%	1 12.5%	6 15.8%
51 to 55	1 25.0%	2 18.2%	0 0.0%	1 9.1%	0 0.0%	4 10.5%
56 to 60	0 0.0%	0 0.0%	2 50.0%	0 0.0%	2 25.0%	4 10.5%
61 to 65	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
66 to 70	0 0.0%	0 0.0%	0 0.0%	1 9.1%	1 12.5%	2 5.3%
71+	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	0 0.0%
Total	4	11	4	11	8	38

Table 24

<i>In what state or U.S. territory do you live?</i>						
	1701	1702	1703	1704	1705	Total
Arizona	0 0.0%	0 0.0%	0 0.0%	1 8.3%	0 0.0%	1 2.3%
California	1 14.3%	2 18.2%	0 0.0%	0 0.0%	4 44.4%	7 16.3%
Colorado	0 0.0%	2 18.2%	0 0.0%	0 0.0%	0 0.0%	2 4.7%
Florida	1 14.3%	0 0.0%	0 0.0%	0 0.0%	1 11.1%	2 4.7%
Illinois	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 11.1%	1 2.3%
Iowa	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 11.1%	1 2.3%
Louisiana	1 14.3%	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 2.3%
Maryland	0 0.0%	2 18.2%	2 50.0%	0 0.0%	0 0.0%	4 9.3%
Michigan	0 0.0%	0 0.0%	0 0.0%	1 8.3%	0 0.0%	1 2.3%
Minnesota	0 0.0%	1 9.1%	0 0.0%	2 16.7%	1 11.1%	4 9.3%
New Jersey	0 0.0%	0 0.0%	0 0.0%	0 0.0%	1 11.1%	1 2.3%
New York	0 0.0%	1 9.1%	1 25.0%	0 0.0%	0 0.0%	2 4.7%
North Carolina	1 14.3%	0 0.0%	1 25.0%	0 0.0%	0 0.0%	2 4.7%
Pennsylvania	1 14.3%	1 9.1%	0 0.0%	0 0.0%	0 0.0%	2 4.7%
South Carolina	0 0.0%	1 9.1%	0 0.0%	0 0.0%	0 0.0%	1 2.3%
Texas	0 0.0%	0 0.0%	0 0.0%	6 50.0%	0 0.0%	6 14.0%
Virginia	1 14.3%	1 9.1%	0 0.0%	0 0.0%	0 0.0%	2 4.7%
Washington	1 14.3%	0 0.0%	0 0.0%	1 8.3%	0 0.0%	2 4.7%
Outside the U.S.	0 0.0%	0 0.0%	0 0.0%	1 8.3%	0 0.0%	1 2.3%
Total	7	11	4	12	9	

Appendix A: Survey Questions

Graduate Degree Graduation Survey

Thank you for taking the time to complete this survey by The College for Financial Planning. Your feedback is important in helping us work to continuously improve our programs and better serve our students. This survey should take no more than 10 minutes of your time. If you start the survey and cannot complete it in one sitting, you can continue the survey at a later time.

Page 1

1. **Your student ID number or name:** _____
2. **Please indicate your major in the Graduate Studies Program:**
 - Personal Financial Planning
 - Finance
3. **What graduate certificate(s) did you earn while pursuing your graduate degree? (select all that apply)**
 - Personal Financial Planning Certificate
 - Financial Analysis Certificate
 - Other (please specify)

Page 2 Reasons for Degree

4. **Rank your reasons for why you decided to earn a graduate degree (1=most important reason, 4=least important reason).**
 - Potential earnings increase
 - Personal development
 - Career development
 - I had tuition benefits from employer or military
5. **Rank your reasons for choosing the College for Financial Planning for your graduate degree (1=most important reason, 7=least important reason).**
 - Applicable majors
 - Influence of colleagues
 - Influence of professor
 - Flexibility of online program
 - Name recognition/reputation of the College for Financial Planning
 - Completed a designation program through the College for Financial Planning
 - Value/cost of program
6. **What other reasons, if any, did you have for choosing the College for Financial Planning for your graduate degree?** _____

Page 3 Knowledge, skills, and personal development

Please complete the following questions as they pertain to your experience as a graduate student with the College for Financial Planning.

7. **To what extent has your experience as a graduate student at the College for Financial Planning contributed to your knowledge, skills, and personal development in the following areas?**
(None, Very little, Some, Quite a bit, Very much)
 - In-depth knowledge of subjects important to my major
 - Career- or work-related knowledge and skills
 - Developing your own values and ethical standards
 - Understanding the ethical standards of your discipline or profession
 - Thinking critically

- Writing clearly and effectively
- Communicating effectively
- Understanding and using quantitative reasoning and methods
- Creating original ideas and solutions
- Judging the merits of arguments based on their sources, methods and reasoning
- Planning and executing complex projects
- Learning on your own (e.g., pursuing ideas, finding the information you need)

Page 4 Student Relationships

Please complete the following questions as they pertain to your experience as a graduate student with the College for Financial Planning.

8. Graduate students at the College for Financial Planning are:

(Strongly Disagree, Disagree, Neither agree nor disagree, Agree, Strongly Agree, Can't Judge)

- Supportive and helpful to each other in meeting the academic demands of the program.
- Interested in a broad range of ideas.
- Serious about their studies.
- Academically honest (do not cheat, plagiarize).
- Of high intellectual quality.

9. Thinking of your own experience, how would you rate your relationships with other students?

(1: Sense of Isolation, 2, 3, 4, 5: Sense of Belonging)

Page 5 Staff and Faculty

10. Graduate program faculty at the College for Financial Planning:

(Strongly Disagree, Disagree, Neither agree nor disagree, Agree, Strongly Agree)

- Are accessible for assistance.
- Are effective teachers.
- Are interested in the academic development of students.
- Are interested in the professional development of students.
- Introduce students to a broad range of ideas, perspectives, and worldviews.
- Listen and respond to student needs, concerns, and suggestions.
- Are knowledgeable professionals in their respective fields.
- Incorporate recent developments in finance and related topics into course content.

11. Thinking about your entire graduate experience with the College for Financial Planning, how satisfied are you with each of the following?

(Very dissatisfied, Dissatisfied, Neither satisfied nor dissatisfied, Satisfied, Very satisfied)

- Availability of faculty
- Academic advising
- Enrollment Services
- Opportunities to be taught by faculty members who are experts in their field of study
- Options within majors
- Quality of class discussions
- Course selection
- The online learning system

Page 6 Graduate student experience

Please complete the following questions as they pertain to your experience as a graduate student with the College for Financial Planning.

12. Overall, how satisfied have you been with your graduate education?

- Very satisfied
- Satisfied
- Neither satisfied nor dissatisfied
- Dissatisfied
- Very dissatisfied

13. Would you recommend the College for Financial Planning to others for graduate studies?

- Definitely Yes
- Probably Yes
- Probably No
- Definitely No

14. If you could start over again, would you still choose to enroll in this program?

- Definitely Yes
- Probably Yes
- Probably No
- Definitely No

15. Please provide any further comments or suggestions regarding the graduate degree program.

Page 7 Work/Life Balance

16. Which of the following best describes your employment situation for the majority of your time while completing the program?

- Employed full time (30 hours or more per week)
- Employed part time (less than 30 hours per week)
- Family and other caregiving
- Unemployed
- Other

17. During your graduate studies, you were able to find a balance between academic work, career and other obligations.

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

18. What could the College have done to help you balance your academic work and your other obligations?

Page 8 Employment and Education

19. Which of the following best describes the current state of your employment?

- Self-employed in own business or professional non-group practice
- For-profit corporation, company or group-practice
- Public institution or agency, including government, military or education
- Family and other caregiving
- Unemployed [if selected, skips to question 23]
- Other (please specify) _____

Page 9 Employment and Education

20. Please indicate the principal industry in which you are currently employed.

- Financial Planning

- Investment Planning
- Securities
- Insurance
- Banking
- Accounting/Taxes
- Education
- Other (please specify) _____

21. How many years have you been working in the industry in which you are currently employed?

- 0 to 5
- 6 to 10
- 11 to 15
- More than 15

22. What are your plans for employment after graduation?

- Have a job that will continue after graduation
- Have a job lined up to begin after graduation
- Will begin to look for a job
- Have a job but will begin to look for a new job
- Pursue additional graduate education
- Family and other caregiving
- Other (please specify) _____

Page 10 Employment and Education

To better understand the students who successful complete our graduate programs, please tell us a little about yourself. This information is voluntary, but it may help us better identify students who need additional support to succeed.

23. Prior to starting a Master’s Program at the College for Financial Planning, your highest level of education was:

- Bachelor’s Degree
- Post-Bachelor’s Professional Certification
- Some Graduate-Level Classes
- Master’s Degree
- JD
- PhD
- Other (please specify) _____

24. Prior to starting a Master’s Program at the College for Financial Planning, what number of distance learning courses had you completed:

- I had not taken a distance-learning course before
- 1 to 3
- 4 to 6
- 7 to 9
- More than 9

25. How did you finance your graduation education?

- Personal income
- Spouse/partner/other family income
- Private student loans
- Veteran’s benefits
- Employer sponsorship

- Scholarship
- Other (please specify) _____

Page 11 Demographics

To better understand the students who successfully complete our graduate programs, please tell us a little about yourself. This information is voluntary, but it may help us better identify students who need additional support to succeed.

26. Gender

- Male
- Female

27. Race

- White/Caucasian
- Black/African American
- Hispanic Non-White
- Hispanic White
- American Indian or Alaska Native
- Asian/Pacific Islander
- Native American
- More than one ethnicity
- Prefer not to answer
- Other (please specify) _____

28. What is your age-range?

- 20 to 25
- 26 to 30
- 31 to 35
- 36 to 40
- 41 to 45
- 46 to 50
- 51 to 55
- 56 to 60
- 61 to 65
- 66 to 70
- 71+

29. Do you currently live in the U.S. or a U.S. territory?

- Yes
- No [if selected, skips to question 31]

Page 12 Location in U.S.

30. In what state or U.S. territory do you live? [skips to end] [drop-down]

Page 13 Location outside U.S.

31. In what country do you currently live? _____

Page 14 Thank You!

Thank you very much for your time. Your thoughts are important to us and we appreciate your insights. If you have any questions or would like to provide us with any additional feedback, please contact the Office of Institutional Research and Effectiveness at cffpresearch@cftp.edu.

When you click the "Done" link below, your responses will be submitted.