Alumni Comments

Although I am a recent grad, the Virginia Tech Financial Planning program has already provided me with numerous benefits. During my job search, it was encouraging to see the respect that employers in the planning industry show towards this program. I was able to feel very confident that I had one of the best backgrounds that a new college grad could have. Also, because of its focus on real-world application, Tech's program has allowed me to jump right into my new job and immediately contribute on a high level. As a result, I am very happy with my first job and enjoy going to work every day. Stephen, 2011

My experience as a student in the VT FP program was exactly what I needed to be prepared for working as a financial planner: I was challenged to be better than I thought I could be, and was supported along the journey to reaching my potential. Our courses spanned the points required by the CFP Board's curriculum, but were taught in an engaging manner. Students were often asked to put themselves in the client's shoes or to envision themselves as a practicing planner rather than simply ingest and apply concepts on exams.

But more than anything, two things stand out for me above all of the wonderful experiences the program provided:

1. The guidance of the program directors, Dr. Ruth Lytton and Prof. Derek Klock, help to shape a mindset focused on leadership, integrity and service that is shared by the students who comprise each graduating class. Graduates are excited to become standard-bearers in the profession and to find ways to contribute to their local professional communities, as well as to give back to the program from which they benefited so much.

2. The opportunities provided for students to gain professional exposure are outstanding. Students are able to participate in mock interviews, hear current planning professionals speak in class, have their resumes critiqued by hiring managers, attend conferences, and visit financial planning firms to position themselves as competitive candidates for jobs directly in the financial planning profession. The importance of this aspect of the program cannot be overstated.

There is no doubt in my mind that my participation in the Virginia Tech Financial Planning Program was the key to me finding my calling as a financial planner, and provided the opportunity to meet my future employer. I am serving as an assistant financial planner for a prominent wealth management firm, and can see myself doing nothing else at the present or for the foreseeable future. Yusuf, 2009
Since graduating in Spring 2010, I have found that financial planning can be one of the most frustrating fields in the work world, but can also be one of the most rewarding. The program gave me a sense of my own finances, a direction in the profession, a lifetime friends, and faculty that care about their students. The program prepared me for the CFP exam as well as some of the unique planning ideas that I come across in my day to day tasks. The program does not prepare you for every planning scenario you will see when starting in the profession, but it will prepare you to ask the correct questions about the scenarios you will encounter. Chris, 2010

Financial planning at Virginia Tech has prepared me for the real world, because of the unique curriculum, the amazing faculty, and the real world application. At my job, my co-workers are amazed when they learn of Virginia Tech's "CFP" path. Not only did Virginia Tech's unique program save me thousands of dollars because I earned my education credits for the CFP exam, but it also gave me more knowledge than my peers. I learned the technical concepts that have allowed me to understand the "why." However, the practical knowledge I learned was priceless. Since graduating, I passed the Series 7 and 63 with ease, feel prepared to take the CFP, and plan on obtaining my MBA within 3-5 years. I have a holistic understanding of the industry, have a desire and passion to make it better, and feel competent in my job. Brandon, 2011

I am proud to say that my undergraduate degree was not “wasted” when I chose to pursue another career path. Although I chose not to pursue my CFP, the knowledge and skills I learned while in the program have helped me immensely in my current job, my personal life, and in graduate school. The relationship management classes were extremely helpful in my current job and improved my ability to manage people, a skill many students in other degree programs may have failed to learn. The background financial knowledge has proven to be invaluable in the workplace and essential for pursuing any type of management position. I am now able to understand and manage my own finances, which is something I think every student should be able to do when they graduate college. The workload and practical projects prepared me well for graduate school, as I have noticed that some students are shocked at the increased responsibility placed on them in graduate classes. This responsibility was taught to us our senior year though a number of rigorous “real-life” projects.

Lastly, the relationships I built in the program with the professors and students are ones that I still maintain today. Dr. Lytton has been especially helpful to all of the graduates by continually sending out job opportunities and staying in touch with her graduates. She has taken a large institution and managed to make it personal by the time you graduate. Josh, 2008
Since graduating in the fall of 2009, I have applied the classroom knowledge gained in the Virginia Tech Financial Planning Program to advance my career. I have passed numerous licensing examinations and the CFP (first try!) all within a little over a year from graduation. Without the preparation the program gave me, I can confidently say, I would not be where I am today.

I owe much of my success to a tight knit group of students, alumni, and faculty that becomes a family. Going the CFP route is something that changed my life in such a positive way. I am now helping people achieve their financial goals and dreams while following mine -- I am doing my dream job! Matt, 2009

The financial planning program at Virginia Tech exceeded my expectations in terms of preparedness for entering the industry. I learned not only the technical skills that I needed to be successful, but also the work ethic and professionalism expected of a new employee. Throughout the program, we were provided with exceptional opportunities to network and experience the industry in and out of the classroom. I started working immediately after college and feel truly lucky to have found a career path where I feel challenged and excited to be a part of every day. While one of the biggest things I have learned is that this industry is constantly evolving and there is always more to learn, I am extremely grateful for the solid foundation that the program provided. Cindy, 2011

The CFP program at Virginia Tech gave me a strong foundation and understanding of financial planning. The program takes a very hands-on approach to education. From the knowledgeable faculty and challenging coursework, to the opportunities to meet and interact with professionals from all concentrations of financial planning, I learned a lot! The education and experience I received from the CFP program gave me the knowledge and confidence I needed to have a career in financial planning and to serve the clients I work with today. Jordan, May 2009

Deciding to attend the information session with Professor Klock about a degree concentration called "Financial Planning" was the best decision I made while at Virginia Tech. After graduating in December ‘10 and being around planners everyday with my current firm outside of Chicago, it is truly amazing for me to be able to provide insight about all the topics in this field directly out of college. The program that Dr. Lytton and Professor Klock have created has not only given me a career path that I cherish but the opportunity and the tools to create any career path that I desire. I am a huge advocate of the CFP Track at Virginia Tech and believe that the sky is the limit once you complete the program. Go Hokies! Thomas, 2010
Virginia Tech's CFP program gave me the knowledge I needed to pass my Maryland Life & Health Insurance license, Series 6, Series 63 and Series 65 licenses immediately upon graduation to become a Financial Advisor. I took what I had learned at Virginia Tech and I went to work for a company that enabled me to develop my own comprehensive financial planning practice. Without the CFP program I would have not been successful in this industry. John, 2009

Although I am not working in the financial planning industry as of now, the program has helped me in numerous ways – including the skills to enter another career field. Most importantly, it allowed me the knowledge to manage my own money…to have insight to the process of planning for myself and the importance of planning for the short, intermediate, and long-term. Daniel, 2011

The CFP Program at Virginia Tech prepared me well for the "real world". After graduating I passed my Series 6, 65, 63, Life and Health Exams and most recently the CFP exam all on the first go. My career is really starting to take off and I was able to "hit the ground running" right out of school by having both the knowledge and tools needed to succeed in this industry. I believe my successes stem from my time in the CFP Program at Virginia Tech. Thank you, Dr. Lytton, for putting together such a great program. Parker, 2009