**Program Planning Sheet**

**Catalog Description**

The concentration in certified financial planning is a four-course specialization in the finance major, covering topics of income taxation; risk management and insurance; and retirement and estate planning. Students who successfully complete the concentration will be immediately eligible to sit for the Certified Financial Planner examination. Graduates with a CFP certificate are well equipped for careers in the growing area of financial planning.

**Student Learning Outcomes**

1. To demonstrate essential financial planning concepts.

2. To apply financial planning concepts to develop optimal strategies for clients’ financial situations.

3. To prepare comprehensive financial plans using modern financial software.

4. To understand the Certified Financial Planning Board’s Code of Ethics and Professional Responsibility.

Students must earn a grade of ‘C’ or better in all major and program courses.

**Degree Requirements (120 Credits)**

Core Curriculum Requirements

Core Curriculum (38-40 Total Credit Hours)

Graduation Requirements

Graduation Requirements (3-7+ Credits)

Foundation Courses (6-12 Credits)

Minimum grade of ‘C’ required in all foundation courses.

Complete the following courses:

\*CSCI 110—Enterprise Business Applications (3 credits)

\*MATH 132—Calculus for Business and Social Science (3 credits)

\*PHIL 318—Business Ethics (3 credits)

Choose one of the following:

\*ENGL 290—Introduction to Business Communication (3 credits)

\*CBAD 290—Integrated Business Communication (3 credits)

Note: Course credit hours only count once toward the total university graduation credit hour requirements.

Business Core Requirements (39-45 Credits)

Minimum grade of ‘C’ required in all business core courses.

Lower Level Business Core:

Complete the following courses:

\*CBAD 120 Q—Introduction to the Global Culture of Business (3 credits)

\*CBAD 201—Financial Accounting (3 credits)

\*CBAD 202—Managerial Accounting (3 credits)

\*CBAD 291—Business Statistics (3 credits)

\*CBAD 292—Decision Analysis (3 credits)

\*ECON 201 Q\*--Macroeconomics (3 credits)

\*ECON 202—Microeconomics (3 credits)

Upper Level Business Core:

Complete the following courses:

\*ACCT 336—Accounting Systems and Data Processing (3 credits)

\*CBAD 301 Q\*--Management and Organizations (3 credits)

\*CBAD 344—Legal Environment of Business (3 credits)

\*CBAD 350 Q\*--Marketing (3 credits)

\*CBAD 364 Q\*--Operations Management (3 credits)

\*CBAD 373 Q\*--Business Integration and Application (3 credits)

\*CBAD 478 Q—Strategic Management (3 credits)

\*FIN 301—Business Finance (3 credits)

Note: Course credit hours only count once toward the total university graduation credit hour requirements.

Major Requirements (24 Credits)

Minimum grade of ‘C’ is required in major requirements.

Complete the following courses:

\*FIN 401—Corporate Finance (3 credits)

\*FIN 402—Investment Analysis (3 credits)

\*FIN 403—Financial Institutions and Markets (3 credits)

\*FIN 404—Business and Financial Analysis (3 credits)

\*ACCT 339—Individual Income Taxation (3 credits)

\*FIN 442—Retirement and Estate Planning (3 credits)

\*FIN 463—Risk Management and Insurance (3 credits)

\*FIN 494—Case Studies in Financial Planning (3 credits)

Electives (0-10 Credits)

Total Credits Required: 120

Blue indicates new course.