Financial Planning Major

Professor: S. Manzoor
Assistant Professor: R. Bhandari, P. Chiappetta, A. Kulkarni, D. Moutusi
Visiting Professor: M. Rockett
Lecturer: S. Wilson
Instructor: B. Benke, J. Jackson, J. Williams

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The Financial Planning major prepares individuals to plan and manage the financial interests and growth of individuals and institutions. Includes instruction in portfolio management, investment management, estate planning, insurance, tax planning, strategic investing and planning, financial consulting services, and client relations.

The Financial Planning major is CFP® Board-registered, meaning graduates are eligible to sit for the CFP® examination.

CIP: 52.0804, Financial Planning and Services

Program Objectives

Graduates of the Financial Planning major successfully demonstrate the ability to:

I. Model the CFP Board’s Code of Ethics and Standards of Conduct in the role of a fiduciary

II. Apply the functions, purpose and general structure of the financial institutions, markets, and regulators as they relate to financial planning

III. Discuss risk management and insurance with the client according to their comfort with risk, aversion to loss, and personal goals

IV. Evaluate a client’s retirement needs and goals and create a plan that includes tax-efficient income distributions, eldercare considerations, and social services

V. Assist a client with constructing an optimal portfolio according to risk tolerance, and tax implications to the client

VI. Create estate plans for clients that include the appropriate type of trust, business succession plan, and accounts for special needs and circumstances

VII. Minimize a client’s federal income tax liability

Majors must have at least a 2.00 grade point average in all courses in the major to satisfy graduation requirements.

Graduates of the program earn a Bachelor of Arts in Financial Planning

ACADEMIC REQUIREMENTS SUMMARY SHEET **ACADEMIC YEAR 2024-2025**

Major: FINANCIAL PLANNING

Student's Last Name First Name Middle Initial

Advisor Date Major Declared

Course Code	Title	Hours	Semester	Grade
Core Business Courses (30 hours)				
ACC 215	Principles of Financial Accounting	3		
ACC 216	Principles of Managerial Accounting	3		
BUS 210	Spreadsheet Applications in Business	3		
BUS 220	Fundamentals of Management	3		
BUS 223	Business Law	3		
ECN 211	Principles of Macroeconomics	3		
ECN 212	Principles of Microeconomics	3		
FIN 318	Corporate Finance I	3		
MAT 114	Elementary Statistics	3		
PHL 244	Business Ethics	3		
Required Financial Planning Core Courses				
ACC 319	Federal Income Tax	3		
FIN 350	Investments	3		
FPL 220	Introduction to Financial Planning	3		
FPL 310	Retirement Planning and Employee Benefits	3		
FPL 320	Risk Management and Insurance	3		
FPL 330	Estate Planning and Trusts	3		
FPL 450	Financial Plan Development	3		
	Total Credits for Major	**51**		

If any substitutions or waivers of requirements are allowed, please list below and initial.

Advisor Signature Department Chair Signature