Personal Financial Planning Certificate (for Business majors only)

The personal Financial Planning Certificate is designed as a comprehensive preparation in all aspects of personal financial planning. The certification covers all of the required topics to fulfill the education requirements to sit for the CFP® Certification Examination.

The student must complete the courses listed below with a grade of "C" or better.

ACC4163 Federal Income Tax Accounting (3)

FIN2183 Financial Literacy (3)

FIN3173 Insurance Planning (3)

FIN3303 Retirement and Employee Benefits (3)

FIN3323 Estate Planning (3)

FIN4103 Investment Planning (3)

FIN4123 Financial Planning (3)

NOTE: The combined prerequisites for the above courses are:
ACC2013 Principles of Accounting A

ACC2023 Principles of Accounting B

ECO2013 Principles of Macroeconomics

ECO2023 Principles of Microeconomics

FIN2233 Beginning Investments

FIN3092 Fundamentals of Investments

FIN3043 Business Finance

GBU2013 Quantitative Analysis for Business Decisions

MTH1243 College Algebra

Total Certificate Requirements (47hrs)