PERSONAL FINANCIAL PLANNING - CERTIFICATE

The Personal Financial Planning Certificate is available to undergraduate students who are not enrolled in the Personal Financial Planning Track. The certificate, which includes coursework requirements and an experiential component, is designed to differentiate students seeking to position themselves for potential career opportunities within the financial services industry and acquire personal skillsets for financial planning and wealth management.

Requirements

In addition to completing the four courses as described below, students must complete a relevant experiential learning activity, a personal reflection and an exit interview.

Code	Title	Credit Hours
Required Courses		
FNCE 2830	Personal Investment Management	3
FNCE 3820	Principles of Personal Financial Planning and Insurance	3
Electives		
Complete two of the following:		6
ACCT 3440	Income Taxation of Individuals	
FNCE 3040	Retirement Planning	
FNCE 3060	Estate Planning	
Total Credit Hours		**12**

Learning Outcomes

- Upon completion of each course, students should be able to demonstrate the associated CFP Board learning objectives.
- The Certificate in Personal Financial Planning will help a student pursue job opportunities in wealth management and personal financial planning firms.