Undergraduate Certificate in Personal Finance

The Personal Finance Program equips graduates to work as financial advisors for individuals or firms. In addition, by completing the coursework for the program, students will be in a position to sit for the Certified Financial Planner examination. The program has coursework in Finance, Accounting, and Law.

To earn the Certificate in Personal Finance, students must complete the following courses:

Code	Title	Hours
Required Courses:		
ACCT 330	Introduction to Taxation	3
BLAW 330	Estate Planning for Wealth Management	3
FIN 330	Introduction to Financial Planning and Retirement	3
FIN 408	Principles of Insurance	3
FIN 430	Financial Planning Capstone	3
Total Hours		**15**

At the completion of this program, students will be able to:

- Forecast retirement needs given investor, market, tax, legal, ethical, professional, and insurance considerations.
- Apply the estate planning process to client with a mastery of regulations and laws surrounding probate, property titling, trusts, and estate taxation along with professional guidelines and ethical standards.
- Effectively create and deliver a financial plan, both orally and in writing, which integrates all steps of the CFP Board’s financial planning process for a simulated client interaction or provided case materials.