

FINANCIAL PLANNING CERTIFICATE

The Certificate in Financial Planning provides students who have an interest in pursuing a career in financial planning with the necessary academic preparation. The program equips students with a foundation in the principles of finance as applied to individuals and helps them pursue the Certified Financial Planner (CFP) certification, which is the gold standard in the financial planning industry. The program closely follows the curriculum recommended by the CFP Board.

Grading Requirement

All courses taken to fulfill program course requirements must be taken for a letter grade except those courses specified by the department as credit/no credit grading only.

All courses must be completed with a grade of C or higher.

Course Requirements for the Certificate

The following courses, or their approved transfer equivalents, are required of all candidates for this certificate.

Course	Title	Units
ACCT 201	Introduction to Financial Accounting	3
ACCT 437	Federal Income Taxation I	3
ECON 103	Principles of Microeconomic Analysis	3
FINA 307	Survey of Finance	3
FINA 351	Investments	3
FINA 453	Estate Planning	3
FINA 454	Financial Planning: Applications	3
FINA 456	Risk and Insurance	3
FINA 487	Understanding the Securities Industry	3
Total Units		27