FINANCIAL PLANNING

The Financial Planning Concentration is designed to prepare undergraduate students to enter the financial planning profession. The Financial Planning curriculum aligns with Certified Financial Planner ("CFP") requirements and is a CFP Board registered program https://www.cfp.net/. This registered program provides students with the opportunity to sit for the CFP Exam upon meeting all requirements. This program covers all the major areas of financial planning, including retirement, employee benefits, income tax, estate planning, and risk management. The Financial Planning Concentration has required classes in Financial Planning, Risk Management, Investments, Income Tax, Estate Tax, Retirement Planning, and Financial Plan Development.

The program is most appropriate for those who intend to enter the financial planning profession as credit counselors, financial advisors, financial planners, wealth managers, or financial product representatives.