

# Financial Planning Major

Professor: S. Manzoor

Assistant Professor: R. Bhandari, P. Chiappetta, A. Kulkarni, D. Moutusi

Visiting Professor: M. Rockett

Lecturer: S. Wilson

Instructor: B. Benke, J. Jackson, J. Williams

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The Financial Planning major prepares individuals to plan and manage the financial interests and growth of individuals and institutions. Includes instruction in portfolio management, investment management, estate planning, insurance, tax planning, strategic investing and planning, financial consulting services, and client relations.

The Financial Planning major is CFP® Board-registered, meaning graduates are eligible to sit for the CFP® examination.

CIP: 52.0804, Financial Planning and Services

## Program Objectives

Graduates of the Financial Planning major successfully demonstrate the ability to:

- I. Model the CFP Board's Code of Ethics and Standards of Conduct in the role of a fiduciary
- II. Apply the functions, purpose and general structure of the financial institutions, markets, and regulators as they relate to financial planning
- III. Discuss risk management and insurance with the client according to their comfort with risk, aversion to loss, and personal goals
- IV. Evaluate a client's retirement needs and goals and create a plan that includes tax-efficient income distributions, eldercare considerations, and social services
- V. Assist a client with constructing an optimal portfolio according to risk tolerance, and tax implications to the client
- VI. Create estate plans for clients that include the appropriate type of trust, business succession plan, and accounts for special needs and circumstances
- VII. Minimize a client's federal income tax liability

Majors must have at least a 2.00 grade point average in all courses in the major to satisfy

ACADEMIC REQUIREMENTS SUMMARY SHEET

ACADEMIC YEAR 2024-2025

Major: FINANCIAL PLANNING

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Student's Last Name	First Name	Middle Initial
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