Financial Planning, Certificate of Proficiency

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Requirements

This certificate adds to the Woodbury School of Business flexibility to meet the needs of individuals seeking to complete the educational requirement to sit for the Certified Financial Planning Board's professional accreditation. It provides the required seven courses in a residential setting for individuals who already have a bachelor degree but lack these required courses. It will supplement the existing bachelor program in Personal Financial Planning and the online seven course program the Woodbury School of Business currently offers in collaboration with Dalton Education.

Total Program Credits: 21

Matriculation Requirements:			
Completion of a bachelor degree.			
Discipline Core Requirements:			21 Credits
Prerequisites may be required.			
	FIN 3060	Introduction to the PFP Profession	3
	FIN 3210	Retirement Planning	3
	FIN 3220	Risk Management and Insurance	3
	FIN 3300	Tax Planning for Personal Financial Planners	3
	FIN 3400	Investment Management	3
	FIN 4210	Estate Planning Fundamentals	3
	FIN 4800	Personal Financial Planning Capstone	3

Graduation Requirements:

1. Completion of a minimum of 21 semester credits.
2. Overall grade point average of 2.5 GPA in all courses. No grade lower than a "C-".

Financial Planning, Certificate of Proficiency *Graduation Plan*

This graduation plan is a sample plan and is intended to be a guide. Your specific plan may differ based on your Math and English placement and/or transfer credits applied. You are encouraged to meet with an advisor and set up an individualized graduation plan in Wolverine Track.

Milestone courses (pre-requisites for a course in one of the subsequent semesters) are marked in red and Italicized.

Semester 1	Course Title	Credit Hours
FIN 3060	Introduction to the PFP Profession	3
FIN 3400	Investment Management	3
	Semester total:	6
Semester 2	Course Title	Credit Hours
FIN 3210	Retirement Planning	3
FIN 3300	Tax Planning for Personal Financial Planners	3
FIN 3220	Risk Management and Insurance	3
FIN 4210	Estate Planning Fundamentals	3
	Semester total:	12
Semester 3	Course Title	Credit Hours
FIN 4800	Personal Financial Planning Capstone	3
	Semester total:	3
	Degree total:	21