

Personal Financial Planning, B.S.

Requirements

The WSB Bachelor of Science in Personal Financial Planning (PFP) prepares graduates with the courses necessary to meet educational requirements to sit for the Certified Financial Planning Board of Standards, Inc. accreditation process. It is intended to prepare students to become fee-for-service professional planners with strong ethical standards who work with families and individuals developing specific budget, asset management, and related planning processes.

Total Program Credits: 120

Matriculation Requirements:			
Business Foundation Courses:			
	ACC 2110	Principles of Accounting I	3
	My Educator ¹		
or	IM 2010	Business Computer Proficiency (3) ¹	
or	IM 2600	Spreadsheet Applications (3) ¹	
	ECON 2010	Principles of Economics I	3
	MATH 1100	Introduction to Calculus (4)	
or	MGMT 2240	Business Calculus	3
	MGMT 2340	Business Statistics I	3
	MKTG 220G	Written Business Communication WE	3
General Education Requirements:			35 Credits
	ENGL 1010	Introduction to Academic Writing	3
or	ENGL 1005	Literacies and Composition Across Contexts (5)	
	ENGL 2010	Intermediate Writing Academic Writing and Research	3
	MATH 1050	College Algebra (4)	
or	MATH 1055	College Algebra with Preliminaries (5)	
or	MATH 1090	College Algebra for Business	3
Complete one of the following:			3
	HIST 2700	US History to 1877 (3)	
and	HIST 2710	US History since 1877 (3)	
	HIST 1700	American Civilization (3)	
	HIST 1740	US Economic History (3)	
	POLS 1000	American Heritage (3)	
	POLS 1100	American National Government (3)	
Complete the following:			
	PHIL 2050	Ethics and Values	3
	HLTH 1100	Personal Health and Wellness (2)	
	PES 1097	Fitness for Life	2
Distribution Courses:			
	ECON 2020	Principles of Economics II (fulfills Social/Behavioral Science credit)	3
	Biology		3
	Physical Science		3
	Additional Biology or Physical Science		3
	Humanities		3

	Fine Arts		3
Discipline Core Requirements:			70 Credits
Business Foundation Courses:			
	ACC 2110	Principles of Accounting I	3
	My Educator ¹		
or	IM 2010	Business Computer Proficiency (3) ¹	
or	IM 2600	Spreadsheet Applications (3) ¹	
	ECON 2010	Principles of Economics I	3
	MATH 1100	Introduction to Calculus (4)	
or	MGMT 2240	Business Calculus	3
	MGMT 2340	Business Statistics I	3
	MKTG 220G	Written Business Communication WE	3
Business Core Courses:			
	MGMT 2390	Professional Business Presentations	3
	MGMT 3000	Organizational Behavior WE	3
	FIN 3100	Principles of Finance	3
	ECON 305G	International Economics (3)	
or	MGMT 330G	Survey of International Business (3)	
or	MGMT 332G	Cross-Cultural Communications for International Business	3
	MGMT 3450	Operations Management	3
	MKTG 3600	Principles of Marketing	3
	MGMT 4860	Business Strategy Formulation and Implementation	3
Personal Financial Planning Core Requirements:			
	FIN 3060	Introduction to the PFP Profession	3
	FIN 3200	Financial Counseling	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 4270	Wealth Management Seminar	3
	FIN 4290	Technological Applications in Personal Financial Planning	3
	FIN 4800	Personal Financial Planning Capstone	3
	FIN 481R	Personal Financial Planning Internship (2) (for a maximum of 3 credits)	3
	FIN 483R	Colloquium in PFP Professionalism	1
Elective Requirements:			15 Credits
Twelve credit hours from the following (or other department approved courses):			12
	FIN 3170	Financial Statement Analysis (3)	
	FIN 4190	Applied Asset Diversification and Management (3)	
	FIN 4200	Financial Counseling Practicum (3)	
	FIN 457R	Advanced Topics in Finance (3)	

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	FIN 4700	CFP Examination Preparation (3)	
	FIN 5180	CFA Examination Preparation (3)	
	MGMT 494R	Seminar (3)	
	MKTG 3650	Professional Selling (3)	
	Three credits of any course numbered 1000 or higher		3

Graduation Requirements:

1. Completion of a minimum of 120 semester credits required in the BS degree; at least 40 credit hours must be upper-division courses.
2. Overall grade point average 2.0 or above with a minimum of 2.5 GPA in all Woodbury School of Business courses. No grade lower than a "C-" in core and specialization courses.
3. Residency hours: Minimum of 30 credit hours of business courses through course attendance at UVU, with at least 10 hours earned in the last 45 hours.
4. Completion of GE and specified departmental requirements. Students are responsible for completing all prerequisite courses.
5. Successful completion of at least one Global/Intercultural course.

NOTE: Students will be limited to 9 hours of upper-division credit until matriculation into Woodbury School is completed.

Footnote
¹ Students will be required to complete My Educator with a score of 80 percent or higher or complete the IM 2010 or IM 2600 course with a grade of B- or higher.

Personal Financial Planning, B.S.**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
<i>ENGL 1010 or ENGH 1005</i>	Introduction to Academic Writing or Literacies and Composition Across Context	3
<i>Math 1050 or MATH 1055 or MATH 1090</i>	College Algebra or College Algebra with Preliminaries or College Algebra for Business	3
Physical Science		3
HLTH 1100 or PES 1097	Personal Health and Wellness or Fitness for Life	2
American Institution		3
	Semester total:	14
Semester 2	Course Title	Credit Hours
<i>ENGL 2010</i>	Intermediate Writing Academic Writing and Research	3
MGMT 2240 or MATH 1100	Business Calculus or Introduction to Calculus	3
<i>ECON 2010</i>	Principles of Economics I (fulfills Social/Behavioral Science credit)	3
Humanities		3
Fine Arts		3
	Semester total:	15
Semester 3	Course Title	Credit Hours
<i>ACC 2110</i>	Financial Accounting	3
MGMT 2400	Macroeconomics	3
MGMT 2340	Business Statistics I	3
PHIL 2050	Ethics and Values	3
<i>FIN 3060</i>	Introduction to the PFP Profession	3
FIN 483R	Colloquium in PFP Professionalism	1
	Semester total:	16
Semester 4	Course Title	Credit Hours
<i>MKTG 3600</i>	Principles of Marketing	3
My Educator or IM 2010 or IM 2600*	Business Computer Proficiency	
FIN 3200	Financial Counseling	3

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<i>MKTG 220G</i> **	Written Business Communication WE	3
Biology		3
3rd Science		3
	Semester total:	15
*Students will be required to complete My Educator with a score of 80 percent or higher or complete the IM 2010 or 2600 course with a score of 80 percent or higher. Course could count for 2 credit of General Elective.		
Notes: **Complete with a B- grade or higher		
Semester 5	Course Title	Credit Hours
<i>FIN 3100</i>	Principles of Finance	3
<i>FIN 4200</i> or <i>FIN Elective</i>	Financial Counseling Practicum	3
<i>FIN 4290</i>	Technological Applications in Personal Financial Planning	3
<i>MGMT 3000</i>	Organizational Behavior WE	3
<i>MGMT 3450</i>	Operations Management	3
	Semester total:	15
Semester 6	Course Title	Credit Hours
<i>FIN 3210</i>	Retirement Planning	3
<i>FIN 3400</i>	Investment Management	3
<i>FIN 4210</i>	Estate Planning Fundamentals	3
<i>FIN 3220</i>	Risk Management and Insurance	3
<i>FIN 457R</i> or <i>FIN Elective</i>	Advanced Topics in Finance	3
	Semester total:	15
Semester 7	Course Title	Credit Hours
<i>FIN 3300</i>	Risk Management and Insurance	3
<i>FIN 4270</i>	Wealth Management Seminar	3
<i>FIN 481R</i>	Personal Financial Planning Internship	3
<i>ECON 305G</i> or <i>MGMT 330G</i> or <i>MGMT 332G</i>	International Economics or Survey of International Business or Cross-Cultural Communications for International Business	3
<i>FIN Elective</i>		3
	Semester total:	15
Semester 8	Course Title	Credit Hours
<i>MGMT 4860</i>	Business Strategy Formulation and Implementation	3

<i>FIN 4800</i>	Personal Financial Planning Capstone	3
General Elective	Could be filled with Computer Proficiency	3
<i>FIN 4700</i> or <i>FIN Elective</i>	CFP Examination Preparation	3
<i>MKTG 2390</i>	Professional Business Presentations	3
	Semester total:	15
	Degree total:	120