

FINANCIAL PLANNING (FPLN)

Courses

FPLN 341 FUNDAMENTALS OF FINANCIAL PLANNING (3)

Introductory course designed to provide students with an overview of the financial planning process. Topics include setting client goals and objectives, investment planning, tax planning, insurance and risk management, and estate planning. Overview of personal financial planning. Prerequisites: ACCT 201, ACCT 202, ECON 201, ECON 202; junior/senior standing.

FPLN 441 RETIREMENT PLANNING AND EMPLOYEE BENEFITS (3)

Designed to provide students with the background necessary to assist clients in planning for their retirement. Provide students with an understanding of the contributions employee benefits plans make toward achieving financial independence. Developing a systematic approach to estimating contribution plans, IRA, 401K, tax-sheltered annuities and government programs. Prerequisite: FPLN 341; major in ACCT, PACT, BUAD, EBUS or ECON.

FPLN 443 ESTATE PLANNING (3)

Effects of federal tax system and other factors impacting estate planning. Prerequisite: FPLN 341; major in ACCT, PACT, BUAD, EBUS or ECON.

FPLN 450 CAPSTONE IN FINANCIAL PLANNING (3)

Designed to simulate the real-world experience of financial planning. To successfully complete the course students must integrate the six major areas (Financial Planning Fundamentals, Insurance Planning, Investment Analysis, Taxation, Retirement Planning, and Estate Planning) of personal financial planning to develop and present a long-term comprehensive financial plan. Designed to fulfill the capstone course requirement of the Certified Financial Planning (CFP) Board. Prerequisites: FPLN 341, FPLN 441, FPLN 443, FIN 333, and ACCT 361; major in ACCT, BUAD and ECON; senior standing.