FINANCIAL PLANNING MAJOR

The Financial Planning major is designed to fulfill the education coursework requirement for CFP® certification. The financial planning curriculum is part of a CFP® Board-Registered Program, one of the first financial planning programs housed in an AACSB accredited business school. The Financial Planning major is appropriate for individuals who wish to work in the broad area of financial services and wealth management. Financial Planning students may pursue careers as financial planners, investment advisers, wealth managers, private bankers, insurance agents, stock brokers, retirement plan administrators, or in a variety of capacities that support these careers. Students who want to be better prepared to manage their own financial affairs will also find this major appealing and applicable.

Learning Goals and Objectives Financial Planning Majors

Goal 1: Functional Financial Planning Skills

Objective 1.1: Students majoring in financial planning will be competent in performing capital needs analyses necessary for analyzing the financial situation of a client in helping them accomplish their financial goals.

Goal 2: Critical Thinking Skills

Objective 2.1: Students majoring in financial planning will think critically and analytically in examining and evaluating the use and validity of assumptions as they analyze the financial situation of a client.

Goal 3: Communication Skills

Objective 3.1: Students majoring in financial planning will demonstrate effective oral communication skills for use in working with clients and other professionals.

Goal 4: Jesuit Traditions

Objective 4.1: Students majoring in financial planning will be able to identify ethical conflicts in client-planner relationships and find ways to properly manage to those conflicts.

All students majoring in Financial Planning must complete the following GEP requirements (please see section in the catalog on the General Education Program for details).

The traditional undergraduate programs include 40 courses distributed across three components: A General Education component divided into Signature Courses, Variable Courses, and an Integrative Learning requirement; a Major and Divisional component; and Free Electives. In addition to course requirements as specified in each area, students must complete one certified course in each of the following overlay areas:

1. Diversity, Globalization or Non-western Area Studies,
2. Ethics Intensive, and
3. Writing Intensive. Overlay requirements are part of the forty-course requirement.

General Education Signature Courses

See this page about Signature courses (https://academiccatalog.sju.edu/curricula/#signature). Six courses

General Education Variable Courses

See this page about Variable courses (https://academiccatalog.sju.edu/curricula/#variable). Six to Nine courses

General Education Integrative Learning Component

See this page about Integrative Learning Component (https://academiccatalog.sju.edu/curricula/#integrative-learning). Three courses

Free Electives

Six courses

Major Requirements

Major Concentration

Required Courses – Class of 2018, 2019, 2020 or Declaration of Major 2015 or 2016 (six (6) courses)
This major applies to students who entered as declared Financial Planning majors in the Classes of 2018, 2019, or 2020, or Class of 2017 students who declared the Financial Planning major in 2015 or 2016. These students may be able to complete a Masters of Science in Financial Services over a 5-year period. Please consult the Finance Department Chair for further information.

<table>
<thead>
<tr>
<th>Code</th>
<th>Title</th>
<th>Hours</th>
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<tbody>
<tr>
<td>FPL 200</td>
<td>Personal Financial Planning</td>
<td>3</td>
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<tr>
<td>FPL 300/FIN 605</td>
<td>Retirement Plan</td>
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<td>FIN 301</td>
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<td>RMI 200</td>
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<td>ACC 315</td>
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<tr>
<td>FPL 495/FIN 620</td>
<td>Financial Planning Capstone</td>
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