PERSONAL WEALTH MANAGEMENT, MINOR

The Personal Wealth Management minor qualifies students to sit for the Certified Financial Planner™ exam. The course selection extensively covers all aspects of personal finance including investments, estate planning, taxation, risk management and insurance, employee benefits, and retirement planning. Graduates with the Personal Wealth Management minor often land careers working in or with securities firms, bank trust departments, mutual funds, insurance companies, investment advisory firms, financial planning firms and pension and accounting firms. Students with this minor will gain extensive knowledge of all areas of personal finance and wealth management.

Note: Students will need to complete FI 414 Investments to sit for the Certified Financial Planner™ exam.

Personal Wealth Management minor		**Hours**
Required:		
AC 371	Introduction To Taxation	3
FI 435	Fund. of Risk Mgt. & Ins.	3
FI 360	Personal Asset Management	3
FI 446	Benefits & Retirement Planning	3
FI 460	Advanced Financial Planning	3
LGS 403	Estates & Trusts	3
Total Hours		**18**