As a financial advisor, you’ll do more than crunch numbers; you will be helping people make good decisions about their future. Whether it’s managing their investment portfolio, figuring out how to control their debt, navigating the complicated tax code or maximizing retirement income, people want an expert they can trust. It’s a role that requires not only technical knowledge, but also strong people skills, like communication, relationship management, listening and being empathetic. The Broad M.S. in Financial Planning and Wealth Management program is designed to provide you with a solid understanding of the cutting-edge concepts and techniques you need to become that trusted advisor. You’ll gain the skills necessary to help meet the evolving needs of an increasingly diverse client base, from individuals to institutional clients like pension funds, foundations and businesses. As a registered CERTIFIED FINANCIAL PLANNER™ (CFP) Program, you’ll be able take the CFP exam upon graduation, earning you the most widely recognized designation for financial advisors.

**CAPTURE BUSINESS SKILLS AND KNOWLEDGE IN AREAS SUCH AS:**
- Interpersonal Skills
- Consumer Empathy
- Investment Planning
- Critical Thinking & Innovation
- Communication Excellence
- Insurance Planning
- Retirement Planning
- Tax & Estate Planning
- Relationship Management
- Law & Ethics
- Education Planning

**ATTRIBUTES**

**FORMAT**
- ON CAMPUS

**CREDITS**
- 30

**LENGTH**
- 8 MONTHS
- STARTING IN THE FALL

**DESIGNED FOR TOMORROW’S FINANCIAL ADVISOR**

- Recent **college graduates** with undergraduate degrees in the social sciences, humanities, or communications
- **Professionals** looking to transition into the wealth management industry
- **Passionate professionals** with an interest in helping others accomplish their financial goals

The M.S. in Financial Planning and Wealth Management is designed to offer students the opportunity to build leading-edge technical skills that the industry requires along with the client relationship management skills that are needed to best serve the diverse needs found in our communities.

**STEPHEN SCHIESTEL**
**PROGRAM DIRECTOR**
**ADDY PROFESSOR OF PRACTICE IN FINANCE**