The **MINOR IN FINANCIAL PLANNING AND WEALTH MANAGEMENT** is designed to provide students with a solid understanding of the concepts and techniques used by wealth management advisors to assist individual and institutional clients. As the industry continues to evolve, students will gain the necessary skills to help firms meet the expanding needs of their client base.

### COURSES

Students who complete all 6 classes in the program will satisfy the education requirement to be eligible to sit for the CFP exam upon graduation. Students will come away with a solid understanding of the techniques of planning along with interpersonal skills required for success.

<table>
<thead>
<tr>
<th>CLASS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| **FI 311**  
| **FI 312**  
| **FI 370**  
INTRODUCTION TO FINANCIAL PLANNING AND WEALTH MANAGEMENT | All components of financial planning are covered with an emphasis on general principles, investment planning, and personal retirement planning. |
| **FI 380**  
PRINCIPLES OF RISK MANAGEMENT AND INSURANCE | Overview of the various techniques for measuring and managing risk. The focus is on risks related to mortality, health-related expenses, property damage, and product liability. |
| **FI 460**  
ESTATE AND INCOME TAX PLANNING | Examines estate and income tax planning issues pertinent for the financial planner. |
| **FI 470**  
ADVANCED WEALTH MANAGEMENT | Covers employee benefit retirement planning issues along with multiple case studies. The culmination of the course is the preparation of a financial plan for a high net worth family. |