

# Personal Financial Planning

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A CFP Board Registered Approved program that prepares students for the financial planning profession to help future financial planning clients maximize life goals through financial advice. This program satisfies the educational requirements for students to be eligible to sit for the Certified Financial Planner™ exam. The program includes the planning domains of personal financial planning fundamentals and planning skills across retirement savings & income planning, tax & estate, household risk management & insurance, and financial plan development. This program helps students develop professional ethics and client communication skills that are particular to financial planning.

## Minor

Code	Title	Credits
<b>Foundational Courses</b>		<b>9-10</b>
ACCTG 201	Principles of Financial Accounting	
<b>Statistics (Choose One)</b>		
BUS ADM 220	Business Statistics	
or MATH 260	Introductory Statistics	
or PSYCH 205	Social Science Statistics	
<b>Upper-level Foundational Course</b>		
FIN 343	Corporation Finance	
<b>PFP Required Courses</b>		<b>21</b>
ACCTG 410	Introduction to Income Tax Theory and Practice	
FIN 282	Personal Financial Planning	
FIN 345	Risk Management and Insurance	
FIN 415	Employee Benefits and Retirement Planning	
FIN 425	Estate and Trust Planning	
FIN 442	Principles of Investment	
FIN 475	Financial Plan Development	
<b>Total Credits</b>		<b>30-31</b>

## Faculty

**Karl Schindl**; Professor; M.S., Northern Illinois University, chair

**Matthew Raunio**; Associate Professor; M.B.A., University of Wisconsin - Oshkosh

**Mussie M Teclezion**; Associate Professor; D.B.A., Southern Illinois University at Carbondale

**Preston Cherry**; Assistant Professor; Ph.D., Texas Tech University

**Heather Kaminski**; Assistant Professor; D.B.A., Anderson University

**Patricia A Albers**; Senior Lecturer; M.B.A., University of Wisconsin - Oshkosh

**Katie R Burke**; Lecturer; M.B.A., University of Wisconsin - LaCrosse

**Gary Christens**; Lecturer; M.B.A., University of Wisconsin-Oshkosh