

Personal Financial Planning

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
Supporting Courses		9-10
ACCTG 201	Principles of Financial Accounting	
FIN 282	Personal Financial Planning	
Statistics (Choose One):		
BUSAN 220	Introduction to Business Statistics	
MATH 260	Introductory Statistics	
PSYCH 205	Social Science Statistics	
Upper-level Courses		21
ACCTG 410	Introduction to Income Tax Theory and Practice	
FIN 343	Corporation Finance	
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	
Total Credits		30-31

Faculty

Rasoul Rezvanian; Professor; Ph.D., Southern Illinois University

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

Thomas S Nesslein; Associate Professor; Ph.D., University of Washington - Seattle

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

Zhuoli Axelton; Assistant Professor; Ph.D., Washington State University

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

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

Eu Jin Kwak; Assistant Professor; Ph.D., University of Georgia*

Grace (Fangjun) Sang; Assistant Professor; Ph.D., Kent State

Kevin Jaklin; Assistant Teaching Professor; M.B.A., University of Wisconsin - Oshkosh, chair