

# MAJOR IN BUSINESS ADMINISTRATION, FINANCIAL PLANNING CONCENTRATION



This program is designed to prepare undergraduate students to enter the financial planning profession. The program is a Certified Financial Planner Board of Standards registered program, and students are eligible to sit for the CFP® Exam upon graduation.\*

## Learning Objectives

Students will demonstrate the ability to:

1. Analyze a client's current financial position.
2. Review a client's risk management needs.
3. Estimate the current capital and future savings needed to fund goals.
4. Prepare and present recommendations for meeting goals.
5. Consider the impact of income and estate tax law on achieving goals.

The Financial Planning concentration has required classes in Financial Planning, Risk Management, Investments, Income Tax, Estate Tax, Retirement Planning, and Financial Plan Development.

This curriculum covers all the major areas of financial planning, including retirement, employee benefits, income tax, estate planning, and risk management. The option is most appropriate for those who intend to enter the financial planning profession as credit counselors, financial advisors, financial planners, wealth managers, or financial product representatives.

## Accelerated Program

The Financial Planning concentration includes an accelerated program option (<https://provost.colostate.edu/accelerated-programs/>) for students to graduate on a faster schedule. Accelerated Programs typically include 15-16 credits each fall and spring semester for three years, plus 6-9 credits over two to three summer sessions (<https://summer.colostate.edu/acceleratedprograms/>). Students who enter CSU with prior credit (AP, IB, transfer, etc.) may use applicable courses to further accelerate their graduation. Visit the Office of the Provost website for additional information about Accelerated Programs (<https://provost.colostate.edu/accelerated-programs/>).

## Potential Occupations

Financial Planning students are prepared for a number of different careers in business. Internships and volunteer experiences enhance skills and marketability.

Examples of financial-planning-related occupations include, but are not limited to: financial planner, investment advisor, consumer credit counselor, personal banker, investment wholesaler, insurance agent, and trust advisor.

\*Certified Financial Planner Board of Standards Inc. owns the certification marks CFP CERTIFIED FINANCIAL PLANNER™ in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.