COLLEGE OF BUSINESS
COLORADO STATE UNIVERSITY

Undergraduate Programs

FINANCIAL PLANNING CONCENTRATION - 24 Credits

COURSE: TITLE	PREREQUISITE(S)	SEMESTER OFFERED	CREDIT
ACT330: Introduction to Taxation	(ACT220)	[Fall, Spring, Summer]	3
FIN310: Financial Markets & Institutions	(ECON204)	[Fall, Spring, Summer]	3
FIN320: Introduction to Financial Planning	*(ACT210, ECON202/AREC202)	[Fall, Spring]	3
FIN342: Risk Management & Insurance	*(FIN300)	[Fall Only]	3
FIN355: Principles of Investments	*(FIN300, FIN310)	[Fall, Spring, Summer]	3
FIN440: Estate Planning	*(ACT330, FIN320)	[Fall Only]	3
FIN442: Employee Benefits & Retirement Planning	*(FIN342)	[Spring Only]	3
FIN445: Financial Plan Development	*(ACT330, FIN320, FIN342)	[Spring Only]	3

LEGEND •UD = Upper Division (300+ level) • Eligible Coursework • Current Term ~~Courses~~ in ~~Progress~~ • * Juniors or Seniors Only

RECOMMENDED COURSE SEQUENCE FOR 4-YEAR GRADUATION

FRESHMAN YEAR	SOPHOMORE YEAR	JUNIOR YEAR	SENIOR YEAR
Arts and Humanities (3B) Biological and Physical Sci. w/lab (3A) CO150 (1A) ECON202 (3C) MATH (1B)	Biological and Physical Sciences (3A) Diversity, Equity, & Inclusion (1C) ECON204 (3C) STAT204	Historical Perspectives (3D) Students MUST complete CO150 & MATH (3 credits) by the time they complete 60 credits to avoid a registration hold.	
BUS100, BUS220 (3B), CIS200	ACT210, ACT220, BUS201 or BUS225 (3B), BUS260, BUS300	CIS370, FIN300, MKT300	BUS479, MGT301, MGT320
		ACT330, FIN310, FIN320, FIN342	FIN355, FIN440, FIN442, FIN445
9 Credits of Electives	6 Credits of Electives	6 Credits of Electives	6 Credits of Electives

Electives Credits = 27

This is ONLY a guide, you should work with your advisor to determine what is best for you!

- Courses may be restricted to specific class levels, use the Course Schedule/registration system (via Ram Web) to view restrictions.
- Terms listed are when the College of Business anticipates each course will be offered and should be utilized with the guidance of your academic advisor for future planning purposes. Courses may be offered in terms different than those listed.

CFP Licensure Information

There are a number of steps you must take to become a licensed Certified Financial Planner (CFP); to learn more about the specific requirements and regulations you must achieve, visit https://www.cfp.net/get-certified/certification-process.

Finance/Real Estate Department
Chair: Dr. Costanza Meneghetti 322 Rockwell Hall
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Internship Coordinator
Chris Stein
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Internship criteria: https://col.st/DmHQT

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