Financial Planning Concentration

The Department of Finance and Real Estate delivers world class education in Financial Planning. The program is a Certified Financial Planner Board of Standards registered program. Successful graduates are eligible to sit for the CFP® Exam upon completion.*

What Do Professionals in Financial Planning Do?
Financial planners assist individuals and families with decisions regarding their personal finances. Comprehensive personal financial planning is the process of formulating, implementing, and monitoring multifunctional decisions that enable an individual or family to achieve their financial goals. Personal financial planning identifies strengths and weaknesses of a financial situation and utilizes this information to provide a framework for decision making from a cost-benefit perspective. Financial planners provide advice or guidance on investments, insurance, taxes, retirement and estate planning.

Potential Careers in Financial Planning
Careers in finance fall broadly into the four categories listed below. There is considerable overlap among the various functional responsibilities, and many planning professionals practice in several areas.

**Estate Planning**
- Legacy Planner
- Trust Advisor
- Trustee
- Succession Planner

**Wealth Management**
- Investment Advisor
- Investment Wholesaler
- Portfolio Manager
- Customer Service Provider

**Financial Planning**
- Financial Planner
- Life Coach
- Consumer Credit Counselor
- Education Planner
- Retirement Planner

**Insurance**
- Financial Representative
- Insurance Agent
- Annuity Consultant
- Insurance Wholesaler
- Risk Manager

Common Traits and Skills of Successful Financial Planning Students and Professionals
- Enjoys helping people
- Good counseling skills
- Strong oral and written communication skills
- Can communicate complex info to non-technical audiences
- Likes to master new challenges
- Enjoys problem solving
- Strong analytic and planning skills
- Detail oriented
- Manages time well and meets deadlines
- Keeps abreast of economic trends and investment innovation
- Understands and enjoys working with technology
- Keeps client information strictly confidential

Tips for Researching Careers in Financial Planning
- Join the Finance Club and run for an office
- Search the web for job profiles and position descriptions
- Talk to alumni of the Finance program
- Attend Career Fairs and ask recruiters about finance jobs
- Take an online assessment (see Career Center website)
- Apply to join the Summit Investment Fund

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

Online Resources
- [www.career.colostate.edu](http://www.career.colostate.edu)
- [www.dora.state.co.us/securities](http://www.dora.state.co.us/securities)
- [www.dora.state.co.us/insurance](http://www.dora.state.co.us/insurance)
- [www.dora.state.co.us/real-estate](http://www.dora.state.co.us/real-estate)
- [www.acinet.org](http://www.acinet.org)
Financial Planning Concentration
This tool provides the specific regulations as a way to illustrate how the curriculum works. However, there is no substitute for working with an academic advisor; please visit with your advisor each semester as they can help you understand how the curriculum can be tailored to meet your individual needs.

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<tr>
<th>Financial Planning Concentration Recommended Course Sequence</th>
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<tr>
<td><strong>FRESHMAN</strong></td>
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<tr>
<td>All-University Core Curriculum (AUCC) 31 Credits</td>
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<tr>
<td>CO150 (Written Communication, 1A)</td>
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<td>ECON202 (Social/Behavioral Sciences, 3C)</td>
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<tr>
<td>MATH141 (Mathematics, 1B)</td>
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<tr>
<td>Lab Science (Biological/Physical Sciences, 3A)</td>
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<tr>
<td>Arts &amp; Humanities (3B)</td>
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Business Core 35 Credits

| BUS100, BUS201, BUS220 (3B) | ACT210, ACT220, BUS260, CIS200 | BUS300 (2B), FIN300, MKT300 | MGT301, MGT320, BUS479 |

Finance Concentration 24 Credits

| ACT330, FIN320, FIN310, FIN342, FIN355 | FIN440, FIN442, FIN445 |

Electives 30 Credits

| 9 Credits of Electives | 6 Credits of Electives | 6 Credits of Electives | 9 Credits of Electives |

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<th><strong>Financial Planning Concentration Courses (24 credits)</strong></th>
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<tbody>
<tr>
<td><strong>COURSE</strong></td>
</tr>
<tr>
<td>ACT330</td>
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<tr>
<td>FIN310</td>
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<tr>
<td>FIN320</td>
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MORE INFO

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http://col.st/TbvdT

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