Wealth Management and Financial Planning (WMFP) Information

Students interested in WMFP should join the Wealth Management Group by referencing https://win.wisc.edu/organization/WMG.

Students must complete the following six (or seven) courses to be eligible for the CFP exam:

- Finance, Investment & Banking 300 Introduction to Finance
  Requisites: Econ 101 and (Acct 100 or concurrent enrollment) and (Gen Bus 306/Econ 310 or concurrent enrollment)

- Finance, Investment & Banking 320 Investment Theory
  Requisites: Finance 300, (MATH 213 or 222), and (Gen Bus 307/Econ 400/ Econ 410 or concurrent enrollment)

- Risk Management Insurance 300 Principles of Risk Management
  Requisites: Econ 101

- Accounting 329 Taxation: Concepts for Business and Personal Planning
  Requisites: Acct 100
  OR
  Accounting 620 **AND** Accounting 621
  Requisites: Acct 301

- Finance 601 Estate Planning for Financial Planners **(Fall term only)**
  Requisites: Finance 300
    - Students must consult Mark Fedenia at mfedenia@wisc.edu if unable to complete Finance 601 in the Fall term and prior to Finance 602.

- Finance, Investment & Banking 602: Wealth Management & Financial Planning **(Spring term only)**
  Requisites: Consent of Instructor