

# Wealth Management and Financial Planning

## Four Year Course Sequencing Guide

Please use this recommended course sequencing document as a reference point as you work with your academic advisor to plan your schedule this semester and throughout your BBA experience. This guide is intended for students whose primary major and career interests are in finance. There are a number of factors that may impact your optimal course sequencing plan, so please consult with your academic advisor. This course sequence prepares students to sit for the CFP exam. Essential courses in finance, accounting, risk management and consumer behavior are essential to the wealth management industry.

Fall Freshman	Spring Freshman	Summer	Fall Sophomore	Spring Sophomore	Summer	Fall Junior	Spring Junior	Summer	Fall Senior	Spring Senior
MATH 211 (Math 221)	<b>MATH 213</b> <b>(Math 222)</b>	CORE  FIN 205	FIN 300	<b>FIN 320</b>	INTERNSHIP	<b>FIN 330</b>	LIB STUDIES	INTERNSHIP	LIB STUDIES	LIB STUDIES
PSYCH 202	GEN BUS 306		<b>FIN 305</b>	<b>FIN 325</b>		FIN 410	LIB STUDIES		LIB STUDIES	GEN BUS 301
ECON 101	AIS 100		<b>AIS 301</b>	AIS 211		CORE	LIB STUDIES		RMI 620	LIB STUDIES
GEN BUS 110	ECON 102		GEN BUS 307	GEN BUS 360		ACCT 329	CORE		RMI 660	FIN 602
EXCEL BASICS	FIN 200		Con Sci 635	FIN 310		RMI 300	ELECT***			
COMM A										

\* Choose from FIN 340, 420, 445, 650, 457, 602 or 635

\*\*\* Take additional electives to get to 120 total credits.

**Current Finance major courses in bold.**

**Meet with my advisor:**  
 DJ Mattison (last name A-L)  
 Zach Hershoff (last name M-Z)