CERTIFICATE IN FINANCIAL PLANNING

Coordinator, Paul Lee

The Certificate in Financial Planning is designed to equip students with the essential knowledge and skills to pass the CFP® certification exam and give them a competitive edge in a growing field that looks for qualified, principled professionals. In this program, students will develop mastery over core topics in financial advising such as investment planning, risk management, insurance and tax planning, estate planning, and retirement savings, while learning to serve clients with integrity and stewardship mindset. The central tenet of financial advising is combining technical expertise with the wisdom needed to make choices that lead to flourishing life. This program weaves biblical principles of love, prudence, and generosity throughout its curriculum, equipping students to become trusted financial advisors who honor God through their professional practice and help their clients flourish.

Requirements

Requirements for a Certificate in Financial Planning are 26 credits hours, including:

Code	Title	Credits
B EC 226	Financial Accounting	
ECON 211	Principles of Microeconomics	
B EC 311	Principles of Financial Planning, Professional Conduct and Regulation	
B EC 312	Risk Management and Insurance Planning	
B EC 313	Investments and Tax Planning	
B EC 314	Retirement and Estate Planning	
B EC 491	Financial Plan Development Capstone	
Total Credits		**26**