

# FINANCIAL PLANNING, BBA

## Bachelor of Business Administration in Financial Planning (640006BBA)

More on the Financial Planning major (<https://www.uakron.edu/cba/undergraduate/majors/financial-planning.dot>)

Financial Planning majors must complete the 6 hour finance core, 21 hours of required coursework and 6 hours of electives in the program. Successful completion of this program qualifies the student to sit for the Certified Financial Planner Certification Examination (CFP®).

## Requirements for Admission

- 2.5 average cumulative
- English Composition I and II (ENGL 111 & ENGL 112)
- Speech requirement (COMM 105 or COMM 106)
- College Algebra (MATH 145) or Calculus with Business Applications (MATH 210)
- Principles of Microeconomics (ECON 200) or Principles of Macroeconomics (ECON 201)
- One of the following courses:
  - Accounting Principles I (ACCT 201)
  - Spreadsheet Modeling & Decision Analysis (ACCT 250)
  - Introduction to Entrepreneurship (ENTRE 201)
  - Legal & Social Environment of Business (BLAW 220)
  - Marketing Principles (MKTG 205)

### College of Business Undergraduate Programs

<http://www.uakron.edu/business/advising> (<http://www.uakron.edu/business/advising/>)  
(330) 972-7042

Email: Business Advising ( [businessadvising@uakron.edu](mailto:businessadvising@uakron.edu) )

College of Business room 260

The following information has official approval of **The Department of Finance** and **The College of Business**, but is intended only as a supplemental guide. Official degree requirements are established at the time of transfer and admission to the degree-granting college. Students should refer to the Degree Progress Report (Stellic) which is definitive for graduation requirements. *Completion of this degree within the identified time frame below is contingent upon many factors, including but not limited to: class availability, total number of required credits, work schedule, finances, family, course drops/withdrawals, successfully passing courses, prerequisites, among others.* The transfer process is completed through an appointment with your academic advisor.

**Three year accelerated option:** for first time students who have earned credits for at least the first year of courses. Credits can be earned through qualifying scores on appropriate Advanced Placement (AP) exams or through [College Credit Plus](#) Program (CCP) courses. Credits for qualifying AP scores or CCP courses are determined by the appropriate academic department. Departments may assign varied course credit, depending on the student's score on an AP exam or [grade in a CCP](#) course. Students may also receive credit by examination or via placement tests, where appropriate.

## Requirements Summary

Code	Title	Hours
General Education Requirements ( <a href="https://bulletin.uakron.edu/undergraduate/general-education/">https://bulletin.uakron.edu/undergraduate/general-education/</a> )		36
Additional Business Requirements		12
College of Business Core		36
Financial Planning Requirements		33
Additional Requirements for Graduation *		3
<b>Total Hours</b>		<b>120</b>

\* Bachelor's degrees require a minimum of 120 credit hours for graduation.

## Recommended General Education Courses

Code	Title	Hours
Students pursuing a bachelor's degree must complete the following General Education coursework. Diversity courses may also fulfill major or Breadth of Knowledge requirements. Integrated and Applied Learning courses may also fulfill requirements in the major.		
Students are not required to enroll in the specific courses listed below. However, to facilitate successful degree completion, the academic department strongly encourages completion of the following recommendations.		
<b>Academic Foundations</b>		<b>12</b>
<i>Mathematics, Statistics and Logic: 3 credit hours</i>		
MATH 139	Finite Math	
<i>Speaking: 3 credit hours</i>		
COMM 105	Introduction to Public Speaking	
	or COMM 106 Effective Oral Communication	
<i>Writing: 6 credit hours</i>		
ENGL 111	English Composition I	
ENGL 112	English Composition II	
<b>Breadth of Knowledge</b>		<b>22</b>
<i>Arts/Humanities: 9 credit hours</i>		
HIST 200	Empires of the Ancient World	
<i>Natural Sciences: 7 credit hours</i>		
<i>Social Sciences: 6 credit hours</i>		
ECON 200	Principles of Microeconomics	
SOCIO 100	Introduction to Sociology	
<b>Diversity</b>		
Domestic Diversity		
SOCIO 100	Introduction to Sociology	
Global Diversity		
HIST 200	Empires of the Ancient World	
<b>Integrated and Applied Learning</b>		<b>2</b>
<i>Select one class from one of the following subcategories:</i>		
Complex Issues Facing Society		
Capstone		

Review the General Education Requirements page for detailed course listings.

**Total Hours** **36**

## Additional Business Requirements

Code	Title	Hours
<b>Mathematics and Statistics requirements</b>		
MATH 139	Finite Math <sup>1</sup>	3
or MATH 138	Finite Math - Expanded	
or MATH 137	Finite Math - Supported	
STAT 261 & STAT 262	Introductory Statistics I and Introductory Statistics II <sup>2</sup>	4
<b>Business Communications Requirement</b>		
COMM 235	Business and Professional Communication <sup>3</sup>	3
<b>Required Business Courses <sup>4</sup></b>		
BUSN 110	College of Business Success Seminar	1
BUSN 111	Professional Development Seminar	1
<b>Recommended Business Courses</b>		
BUSN 200	Personal Leadership Skills	
<b>Total Hours</b>		<b>12</b>

<sup>1</sup> MATH 145 or higher level mathematics may be substituted for MATH 139.

<sup>2</sup> MGMT 304 can be substituted for STAT 261/262.

<sup>3</sup> BUSN 230 can be substituted for COMM 235.

<sup>4</sup> Only required for new first-year students. Transfer students are excluded from this requirement.

## College of Business Core

Code	Title	Hours
ECON 201 or ECON 244	Principles of Macroeconomics <sup>1</sup> Introduction to Economic Analysis	3
ACCT 201	Accounting Principles I	3
ACCT 202	Accounting Principles II	3
ACCT 250	Spreadsheet Modeling & Decision Analysis	3
BLAW 220	Legal & Social Environment of Business	3
FIN 301	Principles of Finance	3
MGMT 201	Management: Principles & Concepts	3
MGMT 490	Strategic Management	3
MGMT 305	Business Analytics <sup>2</sup>	3
SCM 230	Principles of Supply Chain and Operations Management	3
MKTG 205	Marketing Principles	3
INTB 205	International Business	3
<b>Total Hours</b>		<b>36</b>

<sup>1</sup> Students cannot get credit for both ECON 201 and ECON 244.

<sup>2</sup> ECON 325 Applied Econometrics I can be substituted for MGMT 305.

## Financial Planning Requirements

Code	Title	Hours
<b>Finance Core <sup>1</sup></b>		
FIN 338	Financial Markets & Institutions	3

FIN 343 Investments 3

### Required Courses

ACCT 330	Contemporary Federal Taxation <sup>2,3</sup>	3
FPL 332	Foundations of Financial Planning	3
FPL 411	Estate and Financial Planning	3
RMI 414	Risk Management: Property and Casualty <sup>2</sup>	3
RMI 415	Risk Management: Life and Health Insurance <sup>2</sup>	3
FPL 417	Retirement Planning <sup>2</sup>	3
FPL 432	Financial Planning Capstone <sup>2</sup>	3

### Electives

Select six credits of the following: 6

PHIL 362	Business Ethics	
BUSN 497	Honors Project in Business Administration	
RMI 418	Insurance Operations	
FIN 302	Intermediate Corporate Finance	
FIN 436	Commercial Bank Management	
FIN 437	International Business Finance	
FIN 438	International Banking	
FIN 448	Advanced Portfolio Management	
RMI 461	Enterprise Risk Management	
FIN 473	Financial Statement Analysis	
FIN 485	Financial Strategy	
FIN 489	Advanced Financial Analytics	
FIN 490	Selected Topics in Finance	
FPL 493	Internship in Financial Planning <sup>4</sup>	
FIN 495	Research Project in Finance	
FIN 499	Independent Study: Finance	
HRM 241	Human Resource Management	
SALES 275	Professional Selling	

**Total Hours** **33**

<sup>1</sup> Financial Planning Majors must earn a C- or better in each of these classes and a minimum average of C over the classes in the finance core.

<sup>2</sup> Must be admitted to 4 year degree granting Major.

<sup>3</sup> ACCT 321, corequisite for ACCT 330, can be waived for Financial Planning majors.

<sup>4</sup> Students are strongly encouraged to complete RMI 493.

## Graduation Requirements – Review Stellar for Status

- 120 Credit Hours
- College of Business residency = Last 15 credits earned in the College of Business
- UA Residency = Students must complete their final 30 credits in residence at The University of Akron
- At least 50% of the business core and major course requirements must be earned at The University of Akron
- Overall GPA = 2.3
- Major GPA = 2.0
- Business & Economics GPA = 2.0
- Business Core Classes GPA = 2.0

## Recommended Sequence

### 1st Year

#### Fall Semester

	Hours
BUSN 110 College of Business Success Seminar	1
ENGL 111 English Composition I	3
COMM 106 Effective Oral Communication	3
MATH 139 Finite Math	3
SOCIO 100 Introduction to Sociology	3
Humanities Requirement	3
<b>Hours</b>	<b>16</b>

#### Spring Semester

BUSN 111 Professional Development Seminar	1
ENGL 112 English Composition II	3
Natural Science with lab Requirement	4
Arts Requirement	3
Arts/Humanities Requirement	3
Global Diversity Requirement	3
<b>Hours</b>	<b>17</b>

### 2nd Year

#### Fall Semester

ECON 200 Principles of Microeconomics	3
ACCT 201 Accounting Principles I	3
ACCT 250 Spreadsheet Modeling & Decision Analysis	3
BLAW 220 Legal & Social Environment of Business	3
MKTG 205 Marketing Principles	3
<b>Hours</b>	<b>15</b>

#### Spring Semester

ECON 201 Principles of Macroeconomics	3
COMM 235 Business and Professional Communication	3
ACCT 202 Accounting Principles II	3
MGMT 201 Management: Principles & Concepts	3
INTB 205 International Business	3
<b>Hours</b>	<b>15</b>

### 3rd Year

#### Fall Semester

ACCT 330 Contemporary Federal Taxation	3
FIN 301 Principles of Finance	3
SCM 230 Principles of Supply Chain and Operations Management	3
STAT 261 & STAT 262 Introductory Statistics I and Introductory Statistics II	4
Natural Science Requirement	3
<b>Hours</b>	<b>16</b>

#### Spring Semester

FPL 332 Foundations of Financial Planning	3
MGMT 305 Business Analytics	3
MGMT 459 Selected Topics: International Management	1-3
FIN 343 Investments	3
FIN 338 Financial Markets & Institutions	3
RMI 415 Risk Management: Life and Health Insurance	3
<b>Hours</b>	<b>16-18</b>

### 4th Year

#### Fall Semester

FPL 411 Estate and Financial Planning	3
FPL 417 Retirement Planning	3
Finance Elective	3
Free Electives	4
<b>Hours</b>	<b>13</b>

#### Spring Semester

RMI 414 Risk Management: Property and Casualty	3
FPL 432 Financial Planning Capstone	3
MGMT 490 Strategic Management	3
Finance Elective	3
<b>Hours</b>	<b>12</b>
<b>Total Hours</b>	<b>120-122</b>