FINANCIAL PLANNING (FPL)

FPL:200 Foundations of Personal Finance (3 Credits)
Explores application of finance concepts in personal finance with
emphasis on the personal financial planning process. (Formerly
6400:200)

FPL:332 Foundations of Financial Planning (3 Credits)
Prerequisite: [FIN 300 or FIN 301] with a grade of C or better. Introduction
to financial planning, including goal setting, cash management, credit,
housing, education planning, and selected professional issues. (Formerly
6400:332)

FPL:411 Estate and Financial Planning (3 Credits)
Prerequisites: Admission to a major in a four-year degree granting
college, [FIN 300 or FIN 301] with a minimum grade of C- or better, or
permission of Finance Department Chair. Pre/Corequisite: ACCT 330.
Application of estate planning methodologies and policies to financial
planning. (Formerly 6400:411)

FPL:417 Retirement Planning (3 Credits)
Prerequisites: Admission to a major in a four-year degree granting
college, and [FIN 300 or FIN 301] with a grade of C- or better, or
permission of the instructor. An in-depth examination of retirement and
estate planning objectives, methods, and strategies including the study
of employee benefits plans, public and private pension funds, and lifetime
strategies for maximization of estate assets. (Formerly 6400:417)

FPL:432 Financial Planning Capstone (3 Credits)
Prerequisites: Must have been admitted to a major in a four-year degree
granting college, ACCT 330, [ACCT 410 or FPL 411], FPL 417, [FPL 332
with a grade of C or better], and [FIN 341 or FIN 343]. Pre/Corequisite:
RMI 415 and RMI 414. Explores financial planning function, including
contact, data acquisition, plan development and implementation;
addressing planning techniques and financial planning ethical issues.
(Formerly 6400:432)

FPL:493 Internship in Financial Planning (3 Credits)
Prerequisite: Permission of designated faculty member. On the job
experience with public or private sector organizations in the financial
services field. Individual assignments are approved and supervised by the
designated member of the faculty in the student’s major field. Periodic
reports and term papers required. (Formerly 6400:493)