

FINANCIAL PLANNING (FPL)

FPL 200 Foundations of Personal Finance (3 Units)

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 Units)

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 Units)

Prerequisite: [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 Units)

Prerequisite: [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 Units)

Prerequisites: 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 Units)

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)