Financial Planning BBA

Overview

The **Bachelor of Business Administration in Financial Planning**, offered by the Department of Finance, provides students with knowledge and skills that are necessary to become a financial planning professional. Financial planners help individuals meet their life goals through growing, managing and protecting their assets. They holistically evaluate clients' financial situations, develop and present recommendations, advise clients on retirement, taxes, and estate planning, create portfolios that meet clients' investment objectives, and monitor clients' progress toward their financial goals. A successful financial planner must be skilled in the following areas:

- Retirement planning;
- Investment allocation;
- Income tax and estate planning;
- Insurance and employee benefits planning; and
- Financial statement preparation and analysis.

Financial planners are in great demand nationally and in the Philadelphia region. Potential employers include national and regional banks (i.e., Wells Fargo, Bank of America, Citigroup, JPMorgan Chase), asset managers (i.e., Charles Schwab, Vanguard, Fidelity, T. Rowe Price), accounting firms, registered investment advisors, and independent financial planning businesses and institutions.

Campus Location: Main

Program Code: BU-FINP-BBA

Student Professional Organization

All Financial Planning majors are encouraged to join the Financial Planning Association (FPA). This student professional organization provides its members an opportunity to engage and interact with financial planning professionals from registered investment advisors, broker-dealers and national investment firms. The annual FPA Career Day event and weekly student-led workshops prepare students for internships and careers in financial planning.

Licensure/Certification

Certified Financial Planner (CFP)

A Certified Financial Planner (CFP) credential is the gold standard for employment and advancement in the financial planning industry. The CFP requirements are the same in all states. First and foremost, candidates must hold at least a bachelor's degree from an accredited college or university. Second, they must complete coursework offered by a Registered Program provider approved by the CFP Board. The BBA in Financial Planning at the Fox School of Business and Management has been a CFP Board Registered Program since July 2015. To maintain this status, it incorporates 72 required Principal Knowledge Topics in the course curriculum. Third, candidates must pass the CFP exam, which is given three times per year (March, July, September). Fourth, candidates must attain three years of relevant work experience. Fifth, candidates must sign an Ethics Declaration and undergo a background check.

https://www.cfp.net/get-certified/certification-process

Contact Information

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Learn more about the Bachelor of Business Administration in Financial Planning.

These requirements are for students who matriculated in academic year 2023-2024. Students who matriculated prior to fall 2023 should refer to the Archives *to view the requirements for their Bulletin year.*

Summary of Requirements

University Requirements

All new students are required to complete the university's General Education (GenEd) curriculum.

Note that students not continuously enrolled who have not been approved for a Leave of Absence or study elsewhere must follow University requirements current at the time of re-enrollment.

College Requirements

Students must meet College Graduation Requirements for the Bachelor of Business Administration, including the requirements of the major listed below. Students must attain an overall GPA of 2.0 and a 2.0 GPA in the major to graduate as a Finance major.

Major Requirements

Students must follow the Major Requirements and College Requirements current at the time of declaration. Students not continuously enrolled who have not been approved for a Leave of Absence or study elsewhere must follow University, College, and Major requirements current at the time of re-enrollment.

Requirements of Financial Planning Major

Code	Title	Credit Hours
FIN 3507	Security Analysis and Portfolio Management	3
FIN 3519	Introduction to Financial Planning	3
LGLS 3519	Tax, Estate and Trust Planning	3
RMI 3519	Insurance, Benefits and Retirement Planning	3
FIN 4598	Seminar in Financial Planning [1]	3
Select one of the following:		3
AOD 1166	Interpersonal Processes through the Life Span	
AOD 2214	Conflict Processes	
AOD 2215	Mediation: Principles and Practice	
AOD 3316	Negotiation Processes	
AOD 3376	Facilitating Group Decision-Making	
HRM 3501	Power, Influence and Negotiation	
MKTG 3504	Professional Selling and Sales Management	
Total Credit Hours		**18**

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This major capstone is taken in the final semester, and all prerequisites must be met.

Suggested Academic Plan

Bachelor of Business Administration in Financial Planning

Suggested Plan for New Students Starting in the 2023-2024 Academic Year

Please note that this plan is suggested only, ensuring prerequisites are met.

Year 1		
Fall		**Credit Hours**
STAT 1001	Quantitative Methods for Business I	3
ECON 1101	Macroeconomic Principles	3
HRM 1101	Leadership and Organizational Management	3
ENG 0802 or ENG 0812 or ENG 0902	Analytical Reading and Writing or Analytical Reading and Writing: ESL or Honors Writing About Literature	4
GenEd Breadth Course		3
	Credit Hours	**16**
Spring		
STAT 1102	Quantitative Methods for Business II	4

ECON 1102	Microeconomic Principles	3
BA 1103	Legal and Ethical Reasoning in Business	3
IH 0851 or IH 0951	Intellectual Heritage I: The Good Life or Honors Intellectual Heritage I: The Good Life	3
GenEd Breadth Course		3
	Credit Hours	**16**
Year 2		
Fall		
ACCT 2103	Financial and Managerial Accounting for Decision Making	4
STAT 2103	Statistical Business Analytics (waives GenEd Quantitative Literacy requirement)	4
MIS 2101	Digital Systems	3
MKTG 2101	Marketing Management	3
IH 0852 or IH 0952	Intellectual Heritage II: The Common Good or Honors Intellectual Heritage II: The Common Good	3
	Credit Hours	**17**
Spring		
FIN 3101	Financial Management	3
BA 2101	Professional Development Strategies	1
BA 2196	Business Communications	3
Select one of the following: [1]		3
BA 2501	Turning Numbers into Knowledge: Visualizing Data	
BA 2502	Business Analytics: Modern Data Science Techniques	
RMI 2101	Introduction to Risk Management	3
GenEd Breadth Course		3
	Credit Hours	**16**
Year 3		
Fall		
MSOM 3101	Operations Management	3
FIN 3519	Introduction to Financial Planning	3
Business Elective [2]		3
GenEd Breadth Course		3
GenEd Breadth Course		3
	Credit Hours	**15**
Spring		
Select two of the following:		6
FIN 3507	Security Analysis and Portfolio Management	
LGLS 3519	Tax, Estate and Trust Planning	
RMI 3519	Insurance, Benefits and Retirement Planning	
Business Elective [2]		3
GenEd Breadth Course		3
Free Elective		3
	Credit Hours	**15**
Year 4		
Fall		
BA 4102	Strategic Management	3
Select one of the following:		3
FIN 3507	Security Analysis and Portfolio Management	
LGLS 3519	Tax, Estate and Trust Planning	
RMI 3519	Insurance, Benefits and Retirement Planning	
Business Elective [2]		3
GenEd Breadth Course		3

Free Elective		3
	Credit Hours	**15**
Spring		
FIN 4598	Seminar in Financial Planning	3
Select one of the following:		3
AOD 1166	Interpersonal Processes through the Life Span	
AOD 2214	Conflict Processes	
AOD 2215	Mediation: Principles and Practice	
AOD 3316	Negotiation Processes	
AOD 3376	Facilitating Group Decision-Making	
HRM 3501	Power, Influence and Negotiation	
MKTG 3504	Professional Selling and Sales Management	
Free Elective		3
Free Elective		3
Free Elective		2
	Credit Hours	**14**
	Total Credit Hours	**124**

1

Please check with your departmental advisor on which course is most appropriate for the major.

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2000-3999 electives can be selected from: ACCT, AS, BA, ECON, FIN, HRM, IB, LGLS, MIS, MKTG, RE, RMI, STAT, SCM, SGM. Please see your advisor for elective suggestions that match your career objectives.