

Financial Planning Minor

Overview

The **Minor in Financial Planning**, offered by the Department of Finance, is an interdisciplinary program that includes courses from Finance, Legal Studies and Risk Management. The material covered by the program will help students from other majors make better personal financial decisions and prepare them for entering the financial planning industry.

The minor is open to all students.

Campus Location: Main

Contact Information

Oleg Rytchkov, Department Chair
Alter Hall, Room 420
215-204-4146
rytchkov@temple.edu

Cindy Axelrod, Director of the Financial Planning Program
Alter Hall, Room 422
cindy.axelrod@temple.edu

Requirements

Prerequisite Courses

Code	Title	Credit Hours
Select one of the following:		3-4
ACCT 2101 or ACCT 2901	Financial Accounting Honors Financial Accounting	
ACCT 2103 or ACCT 2903	Financial and Managerial Accounting for Decision Making Honors Financial and Managerial Accounting for Decision Making	
ECON 1101 or ECON 1901	Macroeconomic Principles Honors Macroeconomic Principles	3
ECON 1102 or ECON 1902	Microeconomic Principles Honors Microeconomic Principles	3
RMI 2101 or RMI 2901	Introduction to Risk Management Honors Introduction to Risk Management	3
FIN 3101 or FIN 3901	Financial Management Honors Financial Management	3
Quantitative Sequence		
Select one of the following:		7-8
STAT 1001 & STAT 1102	Quantitative Methods for Business I and Quantitative Methods for Business II	
MATH 1021 & MATH 1031	College Algebra and Differential and Integral Calculus	
MATH 1022 & MATH 1041	Precalculus and Calculus I	
Select one of the following:		1-4
STAT 2103 or STAT 2903	Statistical Business Analytics Honors Statistical Business Analytics	
STAT 2104	Selected Topics in Statistical Business Analytics ¹	
MATH 3031	Probability Theory I	

Total Credit Hours

23-28

¹ STAT 2104 has prerequisites and is intended only for students who have earned transfer or AP credit for the specified 3-credit statistics courses.

Minor Courses

Code	Title	Credit Hours
FIN 3507	Security Analysis and Portfolio Management	3
FIN 3519	Wealth Management	3
LGLS 3519	Tax, Estate and Trust Planning	3
RMI 3519	Insurance, Benefits and Retirement Planning	3
Total Credit Hours		12

- Open to business and non-business students.
- Five of the eight prerequisite courses and three of the four minor courses must be taken at Temple.
- Minimum grade of C- is required in the prerequisite courses.
- Minimum grade of C is required in the FIN courses.
- A grade point average of 2.0 is required in the minor courses.
- Except for FIN 3507, the minor courses cannot be used to meet the minor requirements if already used to meet requirements for a major or different minor or certificate.
- Courses for the minor must be completed prior to graduation; if completed, the minor will be recorded on the final transcript upon graduation.
- To declare or rescind this minor, visit the Fox School of Business and Management.

Interested students should discuss with their school/college advisor on how the courses in the minor will fit into their overall degree plan and are strongly encouraged to declare the minor early in their academic career.