# Personal Financial Planning

**University of Missouri**

## Degree Requirements for:

### PERSONAL FINANCIAL PLANNING

Degree Program requirements include General Education courses, HES College requirements, and Professional Program courses. **Prerequisites for admittance to the Professional Program include a 2.5 MU cum gpa based on 50 credit hours; completion of FINPLN 2183 (minimum grade of B-), and 3283 (minimum grade of C).**

Departmental core and professional specialization courses are determined by the department faculty and accreditation standards. A student is allowed one grade in the D-range among all Professional Program courses listed below with the exception of those marked with 1, those courses require a minimum grade of C (2.0) or higher. Courses in the Professional Program may **not** be taken S/U (pass/fail grading option).

### Core Requirements (28 hours)

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>FINPLN 2083</td>
<td>Financial Planning Careers</td>
<td>1</td>
</tr>
<tr>
<td>FINPLN 2183</td>
<td>Personal and Family Finance</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 3282</td>
<td>Financial Counseling</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 3283</td>
<td>Financial Planning: Computer Applications</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 4187</td>
<td>Tax Planning</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 4188</td>
<td>Community Agencies and Volunteerism</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 4380W</td>
<td>Assessing the American Dream</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 4382</td>
<td>Financial Planning: Risk Management</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 4383</td>
<td>Financial Planning: Invest. Mangmt. (3)</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 4387</td>
<td>Consumer and Household Economics</td>
<td>3</td>
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</tbody>
</table>

### Supporting Courses (27 hours)

Some of these courses may “double count” for General Education requirements. This may provide additional elective hours.

- ACCTCY 2036 Accounting I (3)
- FINPLN 2083 Financial Planning Careers (1)
- FINPLN 2183 Personal and Family Finance (3)
- FINPLN 3282 Financial Counseling (3)
- FINPLN 3283 Financial Planning: Computer Applications (3)
- FINPLN 4187 Tax Planning (3)
- FINPLN 4188 Community Agencies and Volunteerism (3)
- FINPLN 4380W Assessing the American Dream (3)
- FINPLN 4382 Financial Planning: Risk Management (3)
- FINPLN 4383 Financial Planning: Invest. Mangmt. (3)
- FINPLN 4387 Consumer and Household Economics (3)
- ECONOM 1014 OR ABM 1041 Microecon. (3)
- ECONOM 3229 Money, Banking and Financial Markets (3)
- MATH 1400 Calculus for Social & Life Sciences (3)
- MANGMNT 3540 Intro to Business Law (3)
- MATH 1400 Calculus for Social & Life Sciences (3)
- PSYCH 1000 Introduction to Psychology (3) (any passing grade)
- STAT 2500 Intro to Probability and Statistics I (3)
- STAT 3500 Intro to Probability and Statistics II (3)

### Professional Specialization (18 hours)

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCTCY 2037</td>
<td>Accounting II</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 4386</td>
<td>Financial Planning: Employee Benefits</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 4389</td>
<td>Financial Planning: Capstone</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 4393</td>
<td>Financial Planning: Estate and Gift Planning</td>
<td>3</td>
</tr>
<tr>
<td>FINPLN 4993</td>
<td>Internship</td>
<td>3</td>
</tr>
</tbody>
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### General Electives (variable to meet 120 credit hour minimum)

Minimum of 120 credit hours are required.

### Prequisites:

- FINPLN 2183 - MATH 1100 (C- or higher)
- FINPLN 4387 - 5-6 cr hrs Economics
- STAT 2500 - MATH 1400 (C- or higher)

### Students must be admitted to the Professional Program before enrolling in:

- FINPLN 4187 - FINPLN 2183, 3283
- FINPLN 4188 - FINPLN 4187
- FINPLN 4380W - Jr standing or higher; ENGLSH 1000 (C- or higher)
- FINPLN 4382 - FINPLN 2183, 3283; 5-6 cr hrs Economics; Statistics
- FINPLN 4383 - FINPLN 2183, 3283; 5-6 cr hrs Economics and ECONOM 3229; Statistics
- FINPLN 4386 - FINPLN 4382, 4383
- FINPLN 4389 - FINPLN 4187, 4382, 4383; pre-requisite or co-requisite 4386, 4393
- FINPLN 4393 - FINPLN 4382, 4383

*Effective Fall 2018*
## Personal Financial Planning
### Sample Course Plan

### FIRST YEAR - FALL SEMESTER
- American History or Government: 3 credits
- GN HES 1100 Intro to Human Environmental Sciences: 1 credit
- HES Foundation: 3 credits
- MATH 1100 College Algebra: 3 credits
- PSYCH 1000 General Psychology: 3 credits
- Science with Lab: 3 credits
- **Total:** 16 credits

### FIRST YEAR - SPRING SEMESTER
- 'ECON 1015 or ABM 1042 Macroeconomics: 3 credits
- ENGLISH 1000 Exposition and Argumentation: 3 credits
- FINPLN 2183 Personal and Family Finance: 3 credits
- MATH 1400: 3 credits
- SOCIOL 1000 Introduction to Sociology: 3 credits
- **Total:** 15 credits

### SECOND YEAR - FALL SEMESTER
- 'ECONOM 1014 or ABM 1041 Microeconomics: 3 credits
- 'FINPLN 2083 Intro to Personal Fin. Mangmnt. Svcs.: 1 credit
- 'FINPLN 3283 Financial Planning: Computer Applic.: 3 credits
- General Elective: 3 credits
- STAT 2500 Intro to Probability and Statistics I: 3 credits
- **Total:** 13 credits

### SECOND YEAR - SPRING SEMESTER
- ACCTCY 2036 Accounting I: 3 credits
- Communications: 3 credits
- ECONOM 3229 Money, Banking and Financial Markets: 3 credits
- 'FINPLN 3282 Financial Counseling: 3 credits
- STAT 3500 Intro to Probability and Statistics II: 3 credits
- **Total:** 15 credits

### THIRD YEAR - FALL SEMESTER
- ACCTCY 2037 Accounting II: 3 credits
- 'FINPLN 4187 Tax Planning: 3 credits
- 'FINPLN 4382 Financial Planning: Risk Management: 3 credits
- 'FINPLN 4383 Financial Planning: Invest. Mangmnt.: 3 credits
- HES Foundation (WI recommended): 3 credits
- **Total:** 15 credits

### THIRD YEAR - SPRING SEMESTER
- FINPLN 4188 Community Agencies and Volunteerism: 3 credits
- 'FINPLN 4386 Financial Planning: Employee Benefits: 3 credits
- 'FINPLN 4393 Financial Planning: Estate and Gift Plan.: 3 credits
- General Elective: 6 credits
- **Total:** 15 credits

### THIRD YEAR - SUMMER SEMESTER
- FINPLN 4993 Internship: 3 credits

### FOURTH YEAR - FALL SEMESTER
- FINPLN 4380W Assessing the American Dream: 3 credits
- 'FINPLN 4389 Financial Planning: Capstone: 3 credits
- General Electives: 3 credits
- Humanities: 3 credits
- MANGMNT 3540 Intro to Business Law: 3 credits
- **Total:** 15 credits

### FOURTH - SPRING SEMESTER
- FINPLN 4387 Consumer and Household Economics: 3 credits
- General Elective: 4 credits
- Humanities: 6 credits
- **Total:** 13 credits

A minimum of 120 total hours required.