BAUER
COLLEGE OF BUSINESS
UNIVERSITY of HOUSTON

PERSONAL FINANCIAL PLANNING TRACK

CAREER PROSPECTS:

Being a Financial Planner means a career in which you will help individuals and families plan, implement, and accomplish financial security and financial independence. It is a "helping people" career.

The Financial Planning industry is experiencing a major growth in job opportunities. The industry is aggressively seeking a younger and more diverse workforce. As aging advisors retire, and the population faces increased life expectancy, the demand for financial planners will continue to greatly increase.

OVERVIEW:

The Personal Financial Planning Track in Finance is a complete undergraduate education in Personal Financial Planning culminating in a BBA in Finance. The Personal Financial Planning Track is a specialization of the traditional BBA in Finance and gives graduates the leading edge when entering the Personal Financial Planning industry.

The PFP Track is approved by the Certified Financial Planner Board of Standards as meeting the educational requirements to sit for the CFP® Exam. The CFP® Designation is the most prestigious designation that can be earned in the Financial Planning industry. More information about becoming a Certified Financial Planner ™ can be found at cfp.net

Students of the Personal Financial Planning Track in Finance are finance majors who take a series of pre-selected finance classes and business electives in their junior and senior years. Students who successfully complete the program will receive a BBA in Finance and a certificate in Personal Financial Planning.

Finance majors interested in course work related to careers in personal financial planning may pursue a Personal Financial Planning (PFP) Track in Finance by meeting the following requirements within the Finance Major:

CURRICULUM

A 3.00 UH GPA is required to file for the Personal Financial Planning Track. Successful completion of:

- **STAT 3331:** Statistical Analysis for Bus Applications 1*
- **FINA 4320:** Investment Management
- **FINA 4325:** Retirement & Estate Planning**
- **FINA 4330:** Corporate Finance
- **FINA 4352:** Personal Financial Planning**
- **FINA 4353:** Practicum in Personal Financial Planning
- **FINA 4354:** Risk Management and Insurance
- **ACCT 4331:** Federal Income Tax I- Individuals

**STAT3331 is a pre-requisite for all 4000-level FINA courses*

***FINA4325 & FINA4352 are pre-requisites for FINA4353*

See the University of Houston course catalog for all relevant polices pertaining to the degree plans and minors.

For more information, visit us at bauer.uh.edu/undergraduate/finance. If you have any questions, contact the Finance Specialty Tracks Advisor, Bethany Rose, at btolar@bauer.uh.edu