

# PERSONAL FINANCIAL PLANNING TRACK

## **CAREER PROSPECTS:**

According to the Occupational Outlook Handbook: “Personal financial advisors are projected to grow by 30 percent over the 2008-18 period, which is much faster than the average for all occupations. Growing numbers of advisors will be needed to assist the millions of workers expected to retire in the next 10 years.”

## **OVERVIEW:**

The Personal Financial Planning Track in Finance is a complete undergraduate education in personal finance 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 finance market. 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:*

- **STAT3331:** Statistical Analysis for Bus Applications 1\*
- **FINA4320:** Investment Management
- **FINA4325:** Retirement & Estate Planning\*\*
- **FINA4330:** Corporate Finance
- **FINA4352:** Personal Financial Planning\*\*
- **FINA4353:** Practicum in Personal Financial Planning
- **FINA4354:** Risk Management and Insurance
- **ACCT4331:** 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](http://bauer.uh.edu/undergraduate/finance). If you have any questions, contact the Finance Specialty Tracks Advisor, Bethany Tolar, at [btolar@bauer.uh.edu](mailto:btolar@bauer.uh.edu)