

## BUAD 341: PRINCIPLES OF FINANCIAL PLANNING

This course provides a comprehensive examination of the general principles of financial planning, professional conduct and regulation, and education planning. These topics constitute thirty percent of the principle knowledge topics tested on the CFP® Certification Examination. The course introduces students to the financial planning process and working with clients to set goals and assess risk tolerance. In addition, student will learn to process and analyze information, construct personal financial statements, develop debt management plans, recommend financing strategies, and understand the basic components of a written comprehensive financial plan. The course also covers the regulatory environment, time value of money, and economic concepts.

**Credits:** 3

**Prerequisites:**

Sophomore status at home institution

**Department:** Business