

FINANCIAL PLANNING

The Financial Planning certificate complements a number of fields, such as finance, marketing, accounting, and economics.

Gain the tools and skills you need to familiarize yourself with tasks such as personal financial planning, investment planning, retirement planning, tax planning, estate planning, and risk management. The program is open to all undergraduate students at UM-Dearborn.

Students interested in preparing for the professional financial planning examinations may wish to complete the Financial Planning minor (<http://catalog.umd.umich.edu/undergraduate/college-business/finance/#minortext>), which includes the courses in this certificate program.

Admission

The certificate in Financial Planning is available to current UM-Dearborn undergraduate students:

- Open to any UM-Dearborn undergraduate student with a GPA of at least 2.0.
- Must declare the Financial Planning certificate by submitting the declaration of certificate form (<https://www.dropbox.com/s/w99jwvnavncm912/DECLARATION%20OF%20CERTIFICATE%20FORM-fillable.4.4.2021.pdf?dl=0>) to their academic unit office.

Goals of the Certificate

Goal 1: Students will explain the components of financial planning.

Goal 2: Students will be able to develop a retirement savings plan for an individual.

Goal 3: Students will describe an ethics framework for a personal financial planner.

Certificate Requirements

The Certificate in Financial Planning requires 4 courses or 12 credit hours.

| Code | Title | Credit Hours |
|------------------------------|-------------------------------|--------------|
| FIN 411 | Financial Planning | 3 |
| FIN 412 | Retirement Planning | 3 |
| Select two of the following: | | 6 |
| ACC 360 | Federal Income Taxation | |
| FIN 407 | Investment Fundamentals | |
| MKT 434 | Sales Mgmt & Personal Selling | |
| Total Credit Hours | | 12 |

Note that the required courses have a prerequisite (FIN 401). This course is required of College of Business students but would be in addition to the 12 credit requirement for most students not in the College of Business.