

Personal Financial Planning Minor

This checklist is based on the current academic catalog and is subject to change. Students should meet with their academic advisor each semester and use Degree Works to monitor their individual progress toward completion of the minor.

The minor in Personal Financial Planning (PFP) is intended to complement a student's primary major and designed to provide non-finance students with an overview of the principles of financial planning and processes that can be used to help individuals to achieve financial independence and security, and also with the knowledge, skills, and competencies needed for success in the financial services industry.

| Six Required Courses (18 Credit Hours) | | | | |
|---|--|----------------|-----------------|--------------|
| Course Number | Course Title | Credits | Semester | Grade |
| ECON 121 | Principles of Macroeconomics | 3 | | |
| MATH140 or MATH150 or MATH 160 | Precalculus Essentials of Calculus Calculus 1 <i>Non-business students: A college-level math or calculus course is accepted as a replacement.</i> | 3 | | |
| ACCT 220 or ACCT 221 | Financial Accounting Principles of Accounting 1 <i>Non-business students: ACCT110 or any college-level accounting course is accepted as a replacement.</i> | 3 | | |
| FIN 313 | Introduction to Finance | 3 | | |
| FIN 341 | Personal Financial Planning | 3 | | |
| FIN 405 | Estate Planning | 3 | | |

| One Elective Finance Course (3 Credit Hours) | | | | |
|---|--|----------------|-----------------|--------------|
| Course Number | Course Title | Credits | Semester | Grade |
| FIN 402 | Retirement Planning | 3 | | |
| FIN 404 | Risk Management and Insurance | 3 | | |
| FIN 423 | Security Analysis and Portfolio Theory | 3 | | |
| FIN 440 | Introduction to Options & Futures | 3 | | |

1. The Minor in Personal Financial Planning consists of 21 credit hours as shown above.
2. At least 12 of the 21 credits hours must be taken at Commonwealth University of PA.
3. A minimum cumulative GPA average of 2.0 must be achieved in all finance courses above.

Total Credits Required for the Minor (21 Credits)

Campus Locations – Please consult your advisor.