

FNCE 307: Financial Plan Development

This course provides students an opportunity to demonstrate the knowledge learned through the prerequisite six-course CFP® curriculum. Students will participate in developing a complete financial plan, through the use of case studies and interviewing mock clients. Presentations of a formal financial plan, demonstrating the ability to set client expectations and communicate with clients by answering questions and concerns, are also required.

Offered most semesters via Rize Consortium

Credits: 3

Prerequisites:

FNCE 301

FNCE 302

FNCE 303

FNCE 304

FNCE 305

FNCE 306

Program: Business Administration