

B.B.A. Financial Planning Concentration

2023-24

WEBSITE

<https://www.swau.edu/academics/financial-planning/>

DEPARTMENT PERSONNEL

AdventHealth Endowed Chair of
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The Bachelor of Business Administrations degree (BBA) with a concentration in Financial Planning is one of many BBA's offered by the Southwestern Adventist University's Department of Business. The goal of the Business Department is to prepare the student for a career in business, guiding them in obtaining the abilities needed to succeed in their chosen area. The student will develop competencies in integrity, research, and critical thinking, communications, leadership, & professional skills through classroom instruction and activities, projects, case studies, interaction with professionals from the community, and other methods.

Job Market

Financial Planning majors will find jobs in the investment and money management industries as personal financial advisors. Financial planners know the ins and outs of investing, saving, and money management. 31% of Americans ages 65 and over consult financial planners when planning for retirement.

Job Outlook

The job outlook for individuals with financial planning continues to improve. Job growth for personal financial advisors is 40% above the national average.

Earnings

Earnings potential for graduates with finance degrees varies widely depending on many factors including the geographic location, the industry you choose, position, skills, and experience. According to the U.S. Bureau of Labor Statistics, the median annual income for Personal Financial Advisors is \$94,170.



Business Core Courses

Required of all BBA students.
***BUAD 202** is required of all Freshman BBA majors. Junior level transfer students may substitute a business elective for this class with approval from their advisor.
Southwestern students who are changing from another major to a BBA are also required to take **BUAD 202** unless their advisor recommends an alternative.

Item #	Title	Credits
ACCT 211	Accounting Principles I	3
ACCT 212	Accounting Principles II	3
BUAD 202	Introduction to Contemporary Business	3
BUAD 211	Profiles of Entrepreneurship	3
BUAD 270	Management Information Systems	3
BUAD 275	Introduction to Data Analytics	3
BUAD 301	Principles of Management	3
BUAD 311	Business Law	3
BUAD 460	Ethics and Business Social Responsibility	3
BUAD 466	Production and Operations Management	3
BUAD 472	Business Policies and Strategies	3
ECON 211	Macroeconomics	3
ECON 212	Microeconomics	3
FNCE 321	Business Finance	3
IBUS 319	International Business	3
MKTG 343	Principles of Marketing	3
	Sub-Total Credits	48

Financial Planning Concentration

Item #	Title	Credits
FNCE 301	General Principles of Financial Planning	3
FNCE 302	Risk Management & Insurance Planning	3
FNCE 303	Investment Planning	3
FNCE 304	Tax Planning	3
FNCE 305	Retirement Savings & Income Planning	3
FNCE 306	Estate Planning	3
FNCE 307	Financial Plan Development	3
	Sub-Total Credits	21

Cognate Requirements

****BUAD 317** may be taken as an alternative to **COMM 111** and also fulfill the communication competency requirement.

Item #	Title	Credits
COMM 111	Speech	3
CSIS 106	Comprehensive Spreadsheets	3
MATH 141	Introduction to Probability and Statistics	3
	Sub-Total Credits	9

Sample 4 Year Curriculum

General Education Requirements
To view general education requirements for this major please visit: <https://catalog.swau.edu/core-curriculum-for-a-bachelors-degree>

Item #	Title	Credits	First Year Second Semester		
BUAD 202	Introduction to Contemporary Business	3	Item #	Title	Credits
ENGL 121	Freshman Composition	3	CSIS 106	Comprehensive Spreadsheets	3
KINT 112	Whole-Person Wellness	2		Fine Arts GE Requirement	3
MATH 141	Introduction to Probability and Statistics	3		History GE Requirement	3
	Life and Physical Science GE Requirement	4		Life and Physical Science GE Requirement	4
	Sub-Total Credits	15		Religion GE Requirement	3
				Sub-Total Credits	16
Second Year First Semester			Second Year Second Semester		
Item #	Title	Credits	Item #	Title	Credits
ACCT 211	Accounting Principles I	3	ACCT 212	Accounting Principles II	3
BUAD 270	Management Information Systems	3	BUAD 211	Profiles of Entrepreneurship	3
ECON 211	Macroeconomics	3	BUAD 275	Introduction to Data Analytics	3
ENGL 220	Research Writing	3	FNCE 301	General Principles of Financial Planning	3
	Religion GE Requirement	3	ECON 212	Microeconomics	3
	Kinesiology GE Requirement	1		Sub-Total Credits	15
	Sub-Total Credits	16			
Third Year First Semester			Third Year Second Semester		
Item #	Title	Credits	Item #	Title	Credits
BUAD 301	Principles of Management	3	BUAD 311	Business Law	3
FNCE 302	Risk Management & Insurance Planning	3	BUAD 317	Business Communication	3
FNCE 321	Business Finance	3	FNCE 303	Investment Planning	3
IBUS 319	International Business	3	FNCE 305	Retirement Savings & Income Planning	3
MKTG 343	Principles of Marketing	3		Religion GE Requirement	3
	Kinesiology GE Requirement	1		Sub-Total Credits	15
	Sub-Total Credits	16			
Fourth Year First Semester			Fourth Year Second Semester		
Item #	Title	Credits	Item #	Title	Credits
BUAD 460	Ethics and Business Social Responsibility	3	BUAD 472	Business Policies and Strategies	3
	BUAD 466 or ECON 401	3	FNCE 307	Financial Plan Development	3
FNCE 304	Tax Planning	3		Finance Elective	3
FNCE 306	Estate Planning	3		Religion GE Requirement	3
	History GE Requirement	3		Literature GE Requirement	3
	Sub-Total Credits	15		Sub-Total Credits	15