Nebraska Wesleyan University
Catalog 2022-2023

Major:

Financial Planning (B.A., B.S)

Academically equivalent, both bachelor of art and bachelor of science degrees will prepare students for a career as a Financial Planner or Advisor.

To become a Certified Financial Planner, students must complete four key requirements:

- Education
    - Complete a bachelor's degree.
    - Complete a seven-course sequence from a CFP Board Registered Program (the LCMC consortium qualifies as a CFP Board Registered Program).
- Exam
    - Complete a 170 question, 6-hour multiple choice exam offered in March, July, or November).
- Experience
    - Complete 6,000 hours of professional experience relating to financial planning or complete 4,000 hours of an apprenticeship. This experience must be completed within five years of sitting for the exam.
- Ethics
    - Complete the ethics declaration form and pass a background check.

Departments/Programs:

Business, Accounting and Economics (Undergraduate)

Financial Planning (B.A. or B.S., 66 hours)

Required Courses	63 hours
ACCT 1310 Principles of Accounting I	3 hours
ACCT 1320 Principles of Accounting II	3 hours
BUSAD 2000 Principles of Marketing	3 hours
ECON 1530 Macroeconomic Principles	3 hours
ECON 1540 Microeconomic Principles	3 hours
Mathematics course (choose from): • MATH 1100 College Algebra • MATH 1400 Pre-Calculus • MATH 1450 Finite Mathematics • MATH 1500 Calculus for Management, Biological, and Social Sciences • MATH 1600 Calculus I	3-5 hours
Statistics course (Choose from:) • BUSAD 2100/ECON 2100 Business and Economic Statistics • MATH 1300 Statistics • MATH 3300 Mathematical Statistics I • PSYCH 2100 Psychological Statistics • SOC 2910 Social Statistics • or other department approved Statistics course	3 hours
BUSAD 2300 Business Communication	3 hours
BUSAD 2500 Principles of Management	3 hours

Required Courses	63 hours
BUSAD 2700 Business Law I	3 hours
BUSAD 3300 Quantitative Methods	3 hours
BUSAD 3700 Financial Management	3 hours
BUSAD 3710 General Principles of Financial Planning*	3 hours
BUSAD 3720 Risk Management & Insurance Planning*	3 hours
BUSAD 3730 Investment Planning*	3 hours
BUSAD 3740 Tax Planning*	3 hours
BUSAD 3750 Retirement Savings & Income Planning*	3 hours
BUSAD 3760 Estate Planning*	3 hours
BUSAD 4450 Financial Plan Development*	3 hours
BUSAD 4600 Business Ethics	3 hours
BUSAD 4970 Business Internship	3 hours
BUSAD 4800 Strategic Management	

*This course is offered remotely via NWU's partnership with a Consortium. The partnership allows students to earn NWU credit for specific courses. Classes are designed by top academics and industry leaders, vetted by NWU, and taught by experts in the field.