Nebraska Wesleyan University

BUSAD 3710 General Principles of Financial Planning

Catalog

2023-2024

Course Description

This course provides a comprehensive examination of the general principles of financial planning, professional conduct and regulation, and education planning. The course introduces students to the financial planning process and working with clients to set goals and assess risk tolerance. In addition, students will learn to process and analyze information, construct personal financial statements, develop debt management plans, recommend financing strategies, and understand the basic components of a written comprehensive financial plan. The course also covers the regulatory environment, the time value of money, and economic concepts. The course and curriculum are approved by the CFP Board of Standards. This course is an online class offered through the Lower Cost Models Consortium.

Prerequisite(s): Sophomore standing.

Course Hours

3 hours

Departments

1. Business, Accounting and Economics (Undergraduate)