Nebraska Wesleyan University

BUSAD 4450 Financial Plan Development

Catalog

2023-2024

Course Description

Students will develop a complete financial plan through 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. 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): Grade of "C-" or higher in BUSAD 3710 General Principles of Financial Planning, BUSAD 3720 Risk Management & Insurance Planning, BUSAD 3730 Investment Planning, BUSAD 3740 Tax Planning, BUSAD 3750 Retirement Savings & Income Planning, and BUSAD 3760 Estate Planning.

Course Hours

3 hours

Departments

1. Business, Accounting and Economics (Undergraduate)