Nebraska Wesleyan University

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

Catalog

2025-2026

Program Description

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

1. 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 1600 Calculus I	3-5 hours
Statistics course (Choose from:) • BUSAD 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

Required Courses	63 hours
BUSAD 2300 Business Communication	3 hours
BUSAD 2500 Principles of Management	3 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
Capstone	
BUSAD 4800 Strategic Management	

This major is offered online through a consortium of accredited colleges and universities. All courses within the program are delivered by faculty employed by partner institutions in the consortium, with technology and administrative support provided by Rize Education.

Oversight of courses offered through the consortium are reviewed and approved by Nebraska Wesleyan University. Students register through Nebraska Wesleyan University and receive academic credit from Nebraska Wesleyan University.