Nebraska Wesleyan University

BUSAD 3710 General Principles of Financial Planning

Catalog

2026-2027

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.

Prerequisite(s): Sophomore standing.

This course is offered online through a consortium of accredited colleges and universities. Instruction is provided by faculty employed by partner institutions within 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.

Course Hours

3 hours

Departments

1. Business, Accounting and Economics (Undergraduate)