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# Financial Planning, Certificate of Proficiency

REQUIREMENTS	GRADUATION PLAN	DEPARTMENT	PROGRAM DETAILS
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This certificate adds to the Woodbury School of Business flexibility to meet the needs of individuals seeking to complete the educational requirement to sit for the Certified Financial Planning Board's professional accreditation. It provides the required seven courses in a residential setting for individuals who already have a bachelor degree but lack these required courses. It will supplement the existing bachelor program in Personal Financial Planning and the online seven course program the Woodbury School of Business currently offers in collaboration with Dalton Education.

**Total Program Credits: 21**

### Matriculation Requirements:

1. Completion of a bachelor degree.

### Discipline Core Requirements: 21 Credits

FIN 3060	Introduction to the PFP Profession	3
FIN 3210	Retirement Planning	3
FIN 3220	Risk Management and Insurance	3
FIN 3300	Tax Planning for Personal Financial Planners	3
FIN 3400	Investment Management	3
FIN 4210	Estate Planning Fundamentals	3
FIN 4800	Personal Financial Planning Capstone	3

### Graduation Requirements:

1. Completion of a minimum of 21 semester credits.
2. Overall grade point average of 2.5 GPA in all courses. No grade lower than a "C-".

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# Finance, B.A.

REQUIREMENTS	GRADUATION PLAN	DEPARTMENT	PROGRAM DETAILS
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The Bachelor Degree in Finance at WSB prepares graduates for careers in the financial services industry. Students learn basic financial theory as well as specialized courses in financial management of corporate and business organizations, analysis of investment alternatives, and other more sophisticated finance related activities. Graduates go into banking, brokerages, become financial managers, and perform a variety of other financial services functions. Students with language skills may take an appropriate number of courses to obtain a Bachelor of Arts degree.

**Total Program Credits: 120**

### Matriculation Requirements:

- My Educator or IM 2100 Document Processing Applications or IM 2600 Spreadsheet Application
- ACC 2110 Principles of Accounting I
- ECON 2010 Principles of Economics I SS
- MGMT 2240 Business Calculus
- MGMT 2340 Business Statistics I
- MKTG 220G Written Business Communication GI WE

### General Education Requirements: 36 Credits

ENGL 1010	Introduction to Academic Writing CC	3
or	ENGL 1005 Literacies and Composition Across Contexts CC (5)	
ENGL 2010	Intermediate Academic Writing CC	3
MATH 1050	College Algebra QL (4)	
or	MATH 1055 College Algebra with Preliminaries QL (5)	
or	MATH 1090 College Algebra for Business QL (3)	
Complete one of the following:		3
HIST 2700	US History to 1877 AS (3)	
and	HIST 2710 US History since 1877 AS (3)	
HIST 1700	American Civilization AS (3)	
HIST 1740	US Economic History AS (3)	
POLS 1000	American Heritage SS (3)	
POLS 1100	American National Government AS (3)	
Complete the following:		
PHIL 2050	Ethics and Values IH	3
HLTH 1100	Personal Health and Wellness TE (2)	
or	EXSC 1097 Fitness for Life TE	2
Distribution Courses:		
ECON 2020	Principles of Economics II SS (fulfills Social/Behavioral Science credit)	3
Biology		3
Physical Science		3
Additional Biology or Physical Science		3
Humanities Distribution (any foreign language 202G/2020 class)		4
Fine Arts Distribution		3

### Discipline Core Requirements: 70 Credits

Business Foundation Courses:		
ACC 2110	Principles of Accounting I <sup>3</sup>	3
ACC 2120	Principles of Accounting II	3
My Educator <sup>1</sup>		
or	IM 2010 Business Computer Proficiency (3) <sup>1</sup>	
or	IM 2600 Spreadsheet Applications (3) <sup>1</sup>	
ECON 2010	Principles of Economics I SS	3
MKTG 220G	Written Business Communication GI WE <sup>3</sup>	3
MGMT 2240	Business Calculus	3
MGMT 2400	Data Analytics for Business	3
MGMT 2340	Business Statistics I	3
Business Core Courses:		
FIN 3100	Principles of Finance <sup>3</sup>	3
ACC 2600	Business Law and Ethics	3
MKTG 3600	Principles of Marketing	3
MGMT 3000	Organizational Behavior WE	3
MGMT 3450	Operations Management	3
ENTR 493R	Entrepreneurship Lecture Series (1)	1
or	MGMT 495R Executive Lecture Series	
ECON 305G	International Economics GI	3
or	MGMT 330G Survey of International Business GI (3)	
or	MGMT 332G Cross-Cultural Communications for International Business GI (3)	
Finance Core Requirements:		
ECON 3010	Intermediate Microeconomics (3)	
or	ECON 3020 Managerial Economics	3
FIN 3150	Financial Management	3
MGMT 3345	Business Statistics II	3
FIN 3400	Investment Management	3
FIN 4100	Management of Financial Institutions	3
MGMT 4860	Business Strategy Formulation and Implementation	3

### Finance Elective Requirements:

Complete 12 credits from any 3000 or 4000 level ACC, ECON, or FIN course not already taken in consultation with appropriate faculty or an advisor. <sup>2</sup>	12
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### Elective Requirements: 14 Credits

Complete 2 hours of general electives and 12 credits of any foreign language course 1010, 1020, 2010 sequence	14
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- Graduation Requirements:
- Completion of a minimum of 120 semester credits required in the BA degree; at least 40 credit hours must be upper-division courses.
  - Overall grade point average 2.0 or above with a minimum of 2.5 GPA in all Woodbury School of Business courses. No grade lower than a "C-" in core and specialization courses.
  - Residency hours: Minimum of 30 credit hours of business courses through course attendance at UVU, with at least 10 hours earned in the last 45 hours.
  - Completion of GE and specified departmental requirements. Students are responsible for completing all prerequisite courses.
  - Successful completion of at least one Global/Intercultural course.
  - Successful completion of at least two writing enriched courses.

NOTE: Students will be limited to 9 hours of upper-division credit prior to completing matriculation.

### Footnote

- Students will be required to complete My Educator with a score of 80 percent or higher or complete the IM 2010 Business Computer Proficiency or IM 2600 Spreadsheet Applications with grade of B- or higher.
- Note: FIN courses in the PFP Major will not be authorized for finance major electives except for FIN 3060 Introduction to the PFP Profession. (FIN courses excluded: FIN 3200 Financial Counseling, FIN 3220 Risk Management and Insurance, FIN 5300 Tax Planning for Personal Financial Planners, FIN 4200 Financial Counseling Practicum, FIN 5210 Retirement Planning, FIN 5260 Estate Planning Fundamentals, FIN 4270 Wealth Management Seminar, FIN 4290 Technological Applications in Personal Financial Planning, FIN 5800 Personal Financial Planning Capstone, and FIN 483R Colloquium in PFP Professionalism)
- Must be completed with a grade of B- or higher.

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## Finance, B.S.

REQUIREMENTS	GRADUATION PLAN	DEPARTMENT	PROGRAM DETAILS
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The Bachelor degree in finance at WSB prepares graduates for careers in the financial services industry. Students learn basic financial theory as well as specialized courses in financial management of corporate and business organizations, analysis of investment alternatives, and other more sophisticated finance related activities. Graduates go into banking, brokerages, become financial managers, and perform a variety of other financial services functions. Students with languages skills may take an appropriate number of courses to obtain a Bachelor of Arts degree.

**Total Program Credits: 120**

### Matriculation Requirements:

- My Educator or IM 2100 Document Processing Applications or IM 2600 Spreadsheet Applications
- ACC 2110 Principles of Accounting I
- ECON 2010 Principles of Economics I SS
- MGMT 2240 Business Calculus
- MGMT 2340 Business Statistics I
- MKTG 220G Written Business Communication GI WE

### General Education Requirements: 35 Credits

	ENGL 1010	Introduction to Academic Writing CC	3
or	ENGL 1005	Literacies and Composition Across Contexts CC (5)	
	ENGL 2010	Intermediate Academic Writing CC	3
Complete one of the following:			3
	MATH 1050	College Algebra QL (4)	
or	MATH 1055	College Algebra with Preliminaries QL (5)	
or	MATH 1090	College Algebra for Business QL (3)	3
Complete one of the following:			3
	HIST 2700	US History to 1877 AS (3)	
and	HIST 2710	US History since 1877 AS (3)	
	HIST 1700	American Civilization AS (3)	
	HIST 1740	US Economic History AS (3)	
	POLS 1000	American Heritage SS (3)	
	POLS 1100	American National Government AS (3)	
Complete the following:			
	PHIL 2050	Ethics and Values IH	3
	HLTH 1100	Personal Health and Wellness TE (2)	
or	EXSC 1097	Fitness for Life TE	2
Distribution Courses:			
	ECON 2020	Principles of Economics II SS (fulfills Social/Behavioral Science credit)	3
	Biology		3
	Physical Science		3
	Additional Biology or Physical Science		3
	Humanities Distribution		3
	Fine Arts Distribution		3

### Discipline Core Requirements: 70 Credits

Business Foundation Courses:			
	ACC 2110	Principles of Accounting I	3
	ACC 2120	Principles of Accounting II	3
Complete one of the following:			3
	My Educator <sup>1</sup>		
or	IM 2010	Business Computer Proficiency (3) <sup>1</sup>	
or	IM 2600	Spreadsheet Applications (3) <sup>1</sup>	
Complete the following:			
	ECON 2010	Principles of Economics I SS	3
	MGMT 2400	Data Analytics for Business	3
	MGMT 2240	Business Calculus	3
	MGMT 2340	Business Statistics I	3
	MKTG 220G	Written Business Communication GI WE	3
Business Core Courses:			
	FIN 3100	Principles of Finance <sup>3</sup>	3
	MKTG 3600	Principles of Marketing	3
	ACC 2600	Business Law and Ethics	3
	MGMT 3000	Organizational Behavior WE	3
	MGMT 3450	Operations Management	3
	MGMT 495R	Executive Lecture Series	1
or	ENTR 493R	Entrepreneurship Lecture Series (1)	
Complete one of the following:			3
	ECON 305G	International Economics	
or	MGMT 330G	Survey of International Business (3)	
or	MGMT 332G	Cross-Cultural Communications for International Business (3)	
Finance Core Requirements:			
	ECON 3010	Intermediate Microeconomics	3
or	ECON 3020	Managerial Economics (3)	
	FIN 3150	Financial Management	3
	MGMT 3345	Business Statistics II	3
	FIN 3400	Investment Management	3
	FIN 4100	Management of Financial Institutions	3
	MGMT 4860	Business Strategy Formulation and Implementation	3
Finance Elective Requirements:			
	Choose 12 credits from any 3000 or 4000 level ACC, ECON, or FIN course not already taken in consultation with appropriate faculty or an advisor. <sup>2</sup>		12

### Elective Requirements: 15 Credits

Complete 15 credits of any courses 1000 or higher	15
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#### Graduation Requirements:

1. Completion of a minimum of 120 semester credits required in the BS degree; at least 40 credit hours must be upper-division courses.
2. Overall grade point average 2.0 or above with a minimum of 2.5 GPA in all Woodbury School of Business courses. No grade lower than a "C-" in core and specialization courses.
3. Residency hours: Minimum of 30 credit hours of business courses through course attendance at UVU, with at least 10 hours earned in the last 45 hours.
4. Completion of GE and specified departmental requirements. Students are responsible for completing all prerequisite courses.
5. Successful completion of at least one Global/Intercultural course.
6. Successful completion of at least two Writing Enriched courses.

NOTE: Students will be limited to 9 hours of upper-division credit prior to completing matriculation.

#### Footnote

1. Students will be required to complete the Business Computer Proficiency exam with a score of 80 percent or higher or complete the IM 2010 Business Computer Proficiency or IM 2600 course with a grade of B- or higher.
2. NOTE: FIN courses in the PFP Major will not be authorized for finance major electives except for FIN 3060 Introduction to the PFP Profession. (FIN courses excluded FIN 3200 Financial Counseling, FIN 3220 Risk Management and Insurance, FIN 5300 Tax Planning for Personal Financial Planners, FIN 4200 Financial Counseling Practicum, FIN 5210 Retirement Planning, FIN 5260 Estate Planning Fundamentals, FIN 4270 Wealth Management Seminar, FIN 4290 Technological Applications in Personal Financial Planning, and FIN 5800 Personal Financial Planning Capstone, and FIN 483R Colloquium in PFP Professionalism)
3. Must be completed with a grade of B- or higher

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# Finance, Graduate Certificate

REQUIREMENTS	GRADUATION PLAN	DEPARTMENT	PROGRAM DETAILS
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The Woodbury School of Business MBA program offers a Graduate Certificate in Finance that provides an introduction to the global securities market and its role in capital formation, wealth-creation, economic development, risk mitigation, wealth management, and other finance-related goals. Courses focus on international corporate finance transactions and the currency implications of financial statement translations. Bloomberg Terminals are used extensively for company and industry analyses.

**Total Program Credits: 9**

### Matriculation Requirements:

1. Application for admission to the Graduate Certificate Program in Finance with application fee.
2. A bachelor's degree from a regionally accredited college/university, a nationally accredited program, or the international equivalent.
3. A 3.0 cumulative undergraduate GPA or a 3.0 GPA calculated on the last 60 semester hours (90 quarter hours) of undergraduate work.
4. Acceptance of graduate certificate program student status offers is valid only for the semester in the offer. Applicants who do not begin attendance during the semester in their admissions offers must reapply and pay the application fees before the applicable semester deadline. At the graduate certificate program's discretion, graduate certificate programs may defer enrollment if students apply for a deferment before the end of the semester for which they were admitted.

### Discipline Core Requirements: 9 Credits

FIN 6130	Financial Statement Analysis and Modeling	3
FIN 6160	International Financial Management	3
FIN 6170	Investment Analysis and Portfolio Analysis	3

### Graduation Requirements:

1. Minimum of 9 credits required for a Certificate.
2. Overall GPA of 3.0 or higher required in graduate certificate courses with no grade lower than a "C" in graduate certificate courses.
3. Residency hours -- minimum of 6 credit hours through course attendance at UVU.
4. Graduate certificate coursework shall be completed within a period of six years.
  1. (Note: See Policy 524, Section 4.3.3).

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# Master of Financial Planning and Analytics, M.F.P.A.

REQUIREMENTS	GRADUATION PLAN	DEPARTMENT	PROGRAM DETAILS
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The Master of Financial Planning and Analytics (MFPA) degree program prepares students for professional positions in financial planning and financial analytics. Our curriculum is also designed to help our students progress towards professional certifications, including the CERTIFIED FINANCIAL PLANNER(TM) (CFP®) certification and the Chartered Financial Analyst (CFA®) certification. Students with foundational courses in financial planning or financial analytics can further expand their existing knowledge by selecting relevant elective courses in new areas of study. With extensive connections to firms across the nation, we seek to provide the best graduate education possible in financial planning and financial analytics.

**Total Program Credits: 36**

### Matriculation Requirements:

The university uses a selective admissions process for admitting students to graduate programs. Meeting minimum admissions criteria does not guarantee admission to the graduate program or to the University as a graduate student. The minimum admissions criteria include the following:

1. Acceptance of an application to the Master of Financial Planning and Analytics program, including payment of the application fee by the established deadline.
2. Official transcripts from all universities attended properly submitted.
3. A bachelor's degree from a regionally accredited college/university, a nationally accredited program, or the international equivalent.
4. A 3.0 or higher cumulative undergraduate GPA or a 3.0 or higher GPA calculated on the last 60 semester hours (90 quarter hours) of undergraduate coursework.
5. For international students whose native language is not English, a TOEFL score of 80 IBT (550 pBT) or higher, or an IELTS band score of 6.5 or higher within the past two years.
6. For international students, all US government requirements for international students must be met.

### Discipline Core: 18 Credits

Complete the following Core classes

FIN 6130	Financial Statement Analysis and Modeling	3
FIN 6140	Regulatory Policy in the Financial Services	3
FIN 6170	Investment Analysis and Portfolio Analysis	3
FIN 6340	Analytics and Advanced Statistics	3
FIN 6820	Research Methods	3
FIN 6840	Behavioral Finance Seminar	3

### Elective Requirements: 18 Credits

Select 18 semester credit hours from the following courses 18

Students preparing to sit for the CFP(R) exam will need to complete the following elective courses:

FIN 6060	Financial Planning for Professionals (3)
FIN 6210	Retirement Planning (3)
FIN 6260	Estate Planning (3)
FIN 6300	Income Tax Planning (3)
FIN 6800	Financial Planning Capstone and Case Analysis (3)

Students preparing to sit for the CFA(R) exam (Level 1) are strongly encouraged to take the following elective courses:

FIN 6510	CFA I Investment Products (3)
FIN 6520	CFA I Financial Markets (3)
FIN 6810	CFA Exam Preparation (3)

Additional elective courses:

FIN 6160	International Financial Management (3)
FIN 6350	Retirement Income Planning (3) (Can substitute for Retirement Planning for the CFP® certification)
FIN 6370	Wealth Management (3)
FIN 6380	Advanced Estate Planning and Asset Protection (3)
FIN 6390	Financial Technology (3)
FIN 6400	Managing Client Relationships (3)
FIN 6450	Planning for Financial Planning Business Owners (3)
FIN 6700	CFP Exam Preparation (3) <i>Strongly recommended to prepare for the CFP® exam</i>
FIN 679R	Special Topics in Finance (3)
FIN 689R	Internship (3)
FIN 690R	Independent Study (3)

Other graduate level courses as approved by the MFPA Program Director or Advisor

Graduation Requirements:

1. Complete a minimum of 36 semester credit hours at the graduate level.
2. Earn a grade of C or higher for all courses used to satisfy the graduation requirement.
3. Achieve a cumulative graduate GPA of 3.0 or higher.
4. Complete a minimum of 24 of the graduate program credit hours at Utah Valley University.

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