

# WEALTH MANAGEMENT MAJOR (B.S.B.)

The **Major in Wealth Management (BFWM)** is designed to prepare students for dynamic careers in financial planning and advisory services.

Wealth management is the application of asset management principles founded on the concepts of financial decision-making and behavioral finance, including the value of time, the assessment of risk, and the measurement of performance within a financial planning framework.

Building on the success of the existing minor, this major will offer a comprehensive curriculum aligned with **Certified Financial Planner (CFP®) Board** educational requirements, integrating core financial principles, behavioral finance, and cutting-edge technology to meet the evolving needs of the wealth management profession.

## CERTIFIED FINANCIAL PLANNER™ (CFP®) Exam

CFP Board of Standards sets and enforces the requirements for CERTIFIED FINANCIAL PLANNER™ certification.

Candidates for CFP® certification must pass the CFP® exam, which tests your ability to apply financial planning knowledge to real-life situations. The CFP® Board must receive verification of your coursework completion by the Education Verification Deadline to be eligible to sit for the exam.

## Financial Planning Association (FPA-NJ)

The department promotes student activities through this organization, which is a chapter under the Financial Planning Association. It welcomes students of all majors to participate in its interactive meetings, which are designed to introduce students to career paths in finance through alumni panel discussions, guest presentations, and corporate field trips. The club's collaboration with the Finance Advisory Board, a Seton Hall alumni association, connects students with mentors who work for financial and non-financial firms. The club also offers tutoring for finance courses in the Center for Securities Trading and Business Analytics.

## Hall Street Fund (Investment Club)

The Investment Club is organized as a mock brokerage corporation complete with an investment fund branded as the "Hall Street Fund." The primary objective of the Hall Street Fund, as managed by the Investment Club, is to provide students with real-life investment banking business experience and encourage students from disciplines other than finance to assume roles of responsibility, including asset allocation, security analysis, portfolio management, operational risks, compliance reporting, marketing campaigns, public relations, expense budgeting, organizational management, and legal reviews. Because students will be making investment decisions as part of broadening their educational experience, it cannot be presumed that the fund's performance will outperform the market. The money has been generously donated by outside benefactors for the purpose of providing working capital. Involvement in this club is a requirement to enroll in / (Student Managed Investment Fund).

## Finance Honor Society

The Stillman School's Finance Honor Society formally recognizes students who consistently achieve academic excellence and who contribute to community development through their active involvement in finance-related campus activities. The criteria for induction are:

- GPA Requirement:**
  - Maintain a cumulative GPA of at least 3.70 during the entire period of undergraduate study at Seton Hall University.
  - Achieve a GPA of at least 3.70 in all finance courses (prefix BFIN) completed during the period of undergraduate study at Seton Hall University.
  - Complete a minimum of 12 credit hours in Finance courses with a grade no lower than a B+ during the period of undergraduate study at Seton Hall University.
- Significant Contribution to Our Department Community (any of the following):**
  - Demonstrate active participation and engagement in Finance-related clubs through attendance, leadership roles, and involvement in club activities.
  - Proactively contribute to the department community by organizing and/or actively participating in events promoting Finance programs and courses.
  - Proactively mentor other students interested in learning Finance.
- Graduation within the school year. The candidate:**
  - Should have graduated in the Spring, Summer, or Fall of the previous calendar year or will graduate in the current Spring semester.
  - Must not have been previously inducted into the Finance Honor Society.

## Arts and Sciences Required Core

### Four-Year Program: Core Curriculum

#### Arts and Sciences Required Core

Code	Title	Hours
CORE 1001	University Life	1
CORE 1101	Journey of Transformation <sup>1</sup>	3
CORE 2101	Christianity and Cult in Dial. <sup>2</sup>	3
COMM elective <sup>3</sup>		3
COST 1600	Speaking and Listening in a Digital and Global Age	3
ENGL 1201 & ENGL 1202	Core English I and Core English II	6
ENGL 2516	Business Writing	3
BIOL, CHEM, EARTH, PHYS elective <sup>4</sup>		3
MATH 1205	Finite Math w Calculus for Bus (C+ minimum)	3
PHIL 1125	Business Ethics	3
RELS elective		3
World Culture elective <sup>5</sup>		3
<b>Total Hours</b>		<b>37</b>

<sup>1</sup> Generally taken in the Fall semester of the first year.

<sup>2</sup> Generally taken in the Spring semester of the second year.

<sup>3</sup> Choose from COMM 2130 Intercultural Communication, COMM 2622 Team Building and the Group Process, COMM 2623 Persuasive Speaking, COMM 2625 Public - Presentational Spkng or COMM 2640 Organizational Communication. Stillman School students are strongly encouraged to take their six hours of required communication courses within the first 75 credits of their curriculum.

<sup>4</sup> A roster of acceptable science courses is available in Jubilee Hall, Room 526, as well as on each student's degree audit.

<sup>5</sup> Students are required to complete one 3-credit world culture elective. Please consult your academic adviser or the staff of the Student

Information Office (Jubilee Hall, Room 526) for a roster of acceptable courses. Language courses are recommended.

## Business Required Core

### Business Required Core

Code	Title	Hours
BUSI 1000	Freshman Business Seminar	1
BACC 2103	Financial Accounting	3
BACC 2104	Managerial Accounting	3
BFIN 2201	Business Finance	3
CORE 3810	Global Business	3
BITM 2701	Management Information Systems (Minimum grade of C)	3
BLAW 2301	Legal Foundations of Business	3
BMGT 2501	Principles of Management	3
BMGT 2503	Organizational Behavior	3
BMKT 2601	Principles of Marketing	3
BPOL 5000	Business Policy	3
BQUA 2811	Business Statistics	3
BQUA 2812	Quantitative Decision Making	3
ECON 1402	Principles of Economics I	3
ECON 1403	Principles of Economics II	3
ECON 2408	Money and Banking (offered by the Department of Finance)	3
<b>Total Hours</b>		<b>46</b>

## Wealth Management Major Requirements

The major requires the completion of 15 credits of required coursework with an average GPA of 2.0 or higher. In addition, to broaden their skills sets and better develop them as financial advisors, students majoring in wealth management must complete a second major selected from any of the colleges/schools at Seton Hall, including Stillman.

Specific course requirements for the wealth management major are as follows:

Code	Title	Hours
<b>Wealth Management Major Requirements</b>		
BFIN 2111	Financial Planning & Risk Management	3
BFIN 2112	Wealth	3
BFIN 2113	Retirement Income	3
BFIN 2114	Financial Planning	3
<i>Electives</i>		
Select one:		3
BFIN 4239	Real Estate Finance	
BFIN 4251	Financial Statement Analysis	
BFIN 4255	Financial Modeling	
BFIN 4265	Behavioral Finance	
ECON 4460	Behavioral Economics	
<b>Total Hours</b>		<b>15</b>