WEALTH MANAGEMENT MINOR

Minor in Wealth Management

(For both Business and Non-Business Majors)

Advisor: Mark Schild, MBA’19, CFP®

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. The Certified Financial Planning Board states that a program such as ours will provide students with three essential elements needed to gain trust and earn recognition in the personal financial field: competency, confidence and credibility.

Students pursuing the minor will build a focused skill set in high demand in a helping profession that aligns with the mission of the University. Successful completion of the minor allows the student to sit for CFP® designation

Code	Title	Hours
Pre-Requisites		
ENGL 2516	Business Writing	3
COST 1600	Oral Communication	3
ECON 1411	Introduction to Economics *	3
Total Hours		**9**

* For Stillman students (ECON 1402/1403) will replace ECON 1411

Code	Title	Hours
Required Courses		
BFIN 2111	Financial Planning and Risk	3
BFIN 2112	Wealth Mgmt - Investment Tax	3
BFIN 2113	Retirement - Estate Planning	3
BFIN 2114	Financial Plan Management	3
Total Hours		**12**