Personal Financial Planning
Career Guide

Leeds School of Business
UNIVERSITY OF COLORADO BOULDER

EXPLORE

Personal financial planning is a track option within your Finance emphasis area. As a planning professional, you will be helping individuals and families reach their financial goals and objectives by applying your broad understanding of financial topics and concepts, in-depth technical knowledge of wealth management and financial planning strategies and awareness about client communication, including relationship building, active listening during client discovery and presentation of planning recommendations.

The program's curriculum has been approved by the Certified Financial Planner Board of Standards. After successfully completing the PFP courses, you will be eligible to sit for the national CFP® Certification Examination. The CFP® designation is a professional mark that will help set you apart within the financial-services industry.

The development of this program has been fostered by a generous grant from Charles Schwab & Company.

Industry Overview

Wealth Management and Personal Financial Planning

Wealth management and personal financial planning professionals assist individuals and families in making sound financial and investment decisions that will help maximize their chances of achieving critical life goals. Careers paths within the industry include independent financial planning firms, investment and accounting firms, broker-dealers and insurance companies. Job positions include financial planner, investment advisor, wealth manager, financial consultant, analyst, paraplanner, service advisor and insurance agent.

Additional Tips

Organizations to Join

- Financial Planning Club
- Leeds Investment and Trading Group
- COFPA *(Colorado Chapter of the Financial Planning Association provides for student memberships)*

Events & Networking

- Personal Financial Planning and Wealth Management Networking
- CFP® Exam Review *(provided to graduating track students at no cost)*
- SIE Exam Review *(provided to interested students at no cost)*

Recruiting Timeline

Fall Semester
Blank

Spring Semester
Blank

Resources

Resume and Cover Letter Templates and Examples on **leeds.ly/CareerRoundup**
Make an appointment with your Industry Coach today at **leeds.ly/careeradv**
Stay up to date on jobs and events at **leeds.ly/Handshake**

Personal Financial Planning
Academic Guide

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An emphasis will be placed on mentoring, internships and placements specific to the personal financial planning field in cooperation with Schwab, local wealth management firms and planning practitioners.

Required Courses

FNCE 2010:
Fundamentals of Financial Analysis

FNCE 3820:
Principles of Personal Financial Planning and Insurance

FNCE 3010:
Corporate Finance

FNCE 3030:
Investment and Portfolio Management

ACCT 3220:
Corporate Financial Reporting 1

FNCE 3040:
Retirement Planning

ACCT 3440:
Income Taxation of Individuals

FNCE 3060:
Estate Planning

Required Senior Capstone

FNCE 4840:
Personal Financial Plan Development Capstone*

**The prerequisites of FNCE 4840 are FNCE 3820, FNCE 3030, ACCT 3440 and FNCE 3040. FNCE 3060 and FNCE 4840 may be taken concurrently.*

Quick Reminders

- Students must complete all **BCOR** and **BASE** classes to enroll in any Area of Emphasis classes, with the exception of **FNCE 2010**, which should be taken concurrently with **BASE** in the sophomore year.
- The Personal Financial Planning track generally takes **4 semesters**, for a total of **27 credit hours**.
- It qualifies students to sit for the CFP certification exam.
- **Note:** To elect this track, inform your undergraduate advisor to add the PFP track to your finance emphasis.
- All courses are **3 credit hours** unless otherwise noted.

Book an appointment with an advisor today!
appointments.colorado.edu