

# FINANCIAL PLANNING, CERTIFICATE

Requirements for an undergraduate certificate may be completed at any campus location offering the specified courses for the certificate.

## Program Description

This certificate provides an introduction to personal financial planning and includes the areas of insurance, taxes, investments, retirement planning and estate planning.

## What is Financial Planning?

Financial planners are professionals who help individuals and businesses to reach their investment goals. Penn State Behrend's certificate in Financial Planning is a registered program with the Certified Financial Planner Board of Standards and fulfills the coursework requirement for the CFP Board's CFP certification program.

## You Might Like This Program If...

You are an Accounting or Finance major who aspires to a financial planning career.

## Program Requirements

To earn an undergraduate certificate in Financial Planning, a minimum of 18 credits is required.

Code	Title	Credits
<b>Prescribed Courses</b>		
ACCTG 310	Federal Taxation I	3
FIN 330	Personal Financial Planning	3
FIN 420	Investment and Portfolio Analysis	3
FIN 430	Estate Planning	3
FIN 450	Retirement Planning	3
FIN 491	Financial Planning Capstone	3

## Prerequisites Required

Code	Title	Credits
FIN 301	Corporation Finance	3

## Certificate Learning Objectives

- **Communication:** Students will be able to effectively communicate the financial plan, both orally and in writing, including information based on research, peer, colleague or simulated client interaction and/or results emanating from synthesis of material.
- **Financial Plan:** Students will be able to demonstrate a comprehensive understanding of the content found within the Financial Planning curriculum and effectively apply and integrate this information in the formulation of a financial plan.
- **Strategy Development:** Students will be able to analyze personal financial situations, evaluating clients' objectives, needs, and values to develop an appropriate strategy within the financial plan.

## Academic Advising

The objectives of the university's academic advising program are to help advisees identify and achieve their academic goals, to promote their

intellectual discovery, and to encourage students to take advantage of both in-and out-of class educational opportunities in order that they become self-directed learners and decision makers.

Both advisers and advisees share responsibility for making the advising relationship succeed. By encouraging their advisees to become engaged in their education, to meet their educational goals, and to develop the habit of learning, advisers assume a significant educational role. The advisee's unit of enrollment will provide each advisee with a primary academic adviser, the information needed to plan the chosen program of study, and referrals to other specialized resources.

READ SENATE POLICY 32-00: ADVISING POLICY (<https://senate.psu.edu/policies-and-rules-for-undergraduate-students/32-00-advising-policy/>)

## Erie

### Richard Hedderick

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## World Campus

### Undergraduate Academic Advising

225 Outreach Building  
University Park, PA 16802  
814-863-3283  
[advising@worldcampus.psu.edu](mailto:advising@worldcampus.psu.edu)

## Career Paths

The certificate in Financial Planning can be pursued by students in most Black School of Business undergraduate degree programs. Penn State Behrend has a comprehensive support system to help you identify and achieve your goals for college and beyond. Meet with your academic adviser often and take advantage of the services offered by the Academic and Career Planning Center beginning in your first semester.

## Careers

The certificate in Financial Planning offers you a foundational education in the areas of insurance, taxes, investments, retirement planning, and estate planning. It is excellent preparation for entry-level careers in personal and corporate finance.

MORE INFORMATION ABOUT POTENTIAL CAREER OPTIONS FOR GRADUATES WITH A CERTIFICATE IN FINANCIAL PLANNING (<https://behrend.psu.edu/school-of-business/academic-programs/certificate-programs/financial-planning/>)

## Opportunities for Graduate Studies

Adding a certificate to your major degree program demonstrates to graduate school admissions committees your commitment to interdisciplinary thinking.

MORE INFORMATION ABOUT OPPORTUNITIES FOR GRADUATE STUDIES (<https://behrend.psu.edu/school-of-business/academic-programs/certificate-programs/financial-planning/>)

## Professional Resources

- AACSB International (<https://www.aacsb.edu/>)
- Certified Financial Planner Board of Standards (<https://www.cfp.net/>)

## Contact

### Erie

BLACK SCHOOL OF BUSINESS

281 Jack Burke Research and Economic Development Center

Erie, PA 16563

814-898-6107

[behrendbusiness@psu.edu](mailto:behrendbusiness@psu.edu)

<https://behrend.psu.edu/school-of-business> (<https://behrend.psu.edu/school-of-business/>)

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<https://www.worldcampus.psu.edu/degrees-and-certificates/penn-state-online-financial-planning-undergraduate-certificate> (<https://www.worldcampus.psu.edu/degrees-and-certificates/penn-state-online-financial-planning-undergraduate-certificate/>)