

FINANCIAL PLANNING, CERTIFICATE

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

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.