

COLLEGE OF BUSINESS AND ECONOMICS
DEPARTMENT OF FINANCE, REAL ESTATE AND INSURANCE

Sequence in Personal Financial Planning

What is the Sequence in Personal Financial Planning?

The Sequence in Personal Financial Planning is a set of courses approved by the Certified Financial Planner Board of Standards to prepare students to take the CFP® Certification Examination.

We have two CFP Board registered programs: (1) the BS in Finance, Sequence in Personal Financial Planning and (2) the BS in Business Administration, Option in Financial Services, Sequence in Personal Financial Planning. In addition, the capstone course of our programs – FIN 442 – is also separately registered with the CFP Board of Standards.

What are the requirements for the CFP Board-Registered Programs at CSUN?

You must complete the requirements for either the BS in Finance or the BS in Business Administration, Option in Financial Services and earn a C or better in each of the following six courses:

FIN 303 Financial Management
FIN 352 Investments I
FIN 437 Advanced Topics in Finance (The tax and estate planning section only)
FIN 336 Principles of Insurance
FIN 440 Retirement Planning and Employee Benefits
FIN 442 Theory and Practice of Financial Planning

Does the Sequence show up on my transcripts?

No, your transcripts will show either a B.S. in Finance or a B.S. in Business Administration, Option in Financial Services. Upon successful completion of all the requirements, your name will be reported to the CFP Board of Standards to be included in the eligibility list. However, you may wish to indicate on your resume that you have completed a CFP® Board registered program.

How do I sign up?

Students interested in the Sequence in Personal Financial Planning should sign up at the Finance Department Office (JH 3125) beginning Monday, April 9.

Who can I talk to about the CFP Board-Registered Programs at CSUN?

The Program Director of the CFP Board-Registered Programs at CSUN is Dr. Monica Hussein. You may visit her at her office, Juniper Hall room 4115, or send her an email at monica.her@csun.edu.

Where can I find more information about careers in financial planning?

Personal financial planner is rated the top 20 best jobs for both 2011 and 2010 by CareerCast.com. Their ranking is based on five key factors: Physical Demands, Work Environment, Income, Stress and Hiring Outlook. For more information go to <http://www.careercast.com/jobs-rated/2011-ranking-200-jobs-best-worst>

Personal Financial Planners are compensated well with an annual average wage above \$90,000 according to the Occupational Employment & Wages, compiled by the U.S. Bureau of Labor Statistics in May 2010 (<http://data.bls.gov/cgi-bin/print.pl/oes/current/oes132052.htm>).

In addition, you can find more information online at <http://www.cfp.net/become/Career.asp>