

Requirements for the CFP® Board-Registered Programs at CSUN

The Sequence in Personal Financial Planning Program is designed specifically for CSUN undergraduate students who major in BS in Finance or BSBA, Option in Insurance and Financial Services. Students must complete the requirements for either the BS in Finance or the BSBA, Option in Insurance and 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