FINANCE – Option in Financial Planning

DEGREE REQUIREMENTS (24 UNITS)

CATALOG YEAR 2016 - PRESENT

A “C” or higher grade in FIN 303 is required for all 300-level courses in the David Nazarian College of Business and Economics. All 400-level courses in the David Nazarian College of Business and Economics require passing the Upper Division Writing Proficiency Exam (UDWPE) with a score of 8 or higher.

FINANCE CORE REQUIREMENTS (9 UNITS)

BLAW 308 Business Law II (3)
Prerequisites: BLAW 280; BUS 302/L are pre/co-requisites for business majors.

FIN 352 Investment Management (3)
Prerequisites: FIN 303 with a “C” or better; BUS 302/L for business majors.

Communication Requirement (3)
Prerequisite: Completion of the lower division writing requirement
* BLAW 368, COMS 323 or ENLG 306 or PHIL 305 fulfills GE
† Preparatory: Demonstrated proficiency; instructor consent required

Select ONE of the following courses:
- BLAW 368* Law, Business and Ethics (3)
- COMS 323* Group Communication (3)
- COMS 443 Rhetoric in Business (3)
- ENGL 305 Intermediate Expository Writing (3)
- ENGL 306* Report Writing (3)
- ENGL 407† Composition and the Professions (3)
- PHIL 305* Business Ethics and Public Policy (3)

OPTION REQUIRED COURSES (12 UNITS)
Prerequisites: FIN 303 with a “C” or better (except for FIN 336); BUS 302/L for business majors; all 400-Level courses require completion of the UDWPE with a score of 8 or higher.

FIN 336 Principles of Insurance (3)

FIN 440 Retirement Planning and Employee Benefits (3)

FIN 446 Income Tax and Estate Planning (3)

FIN 442 Theory and Practice of Financial Planning (3)

FINANCE DEGREE REQUIREMENTS (24 UNITS)

OPTION ELECTIVE REQUIREMENTS
(3 UNITS, ONE COURSE)

-- Select 3 units (one course) of Upper Division Finance courses from the list below; excludes FIN 102, 302, 338, 431, and 439, but may include: ACCT 440, 450, ECON 310 or 409.
-- Refer to the current University Catalog for specific prerequisites.
-- Not all electives are offered every semester.
-- Finance students interested in taking real estate courses are encouraged to pursue a double major or minor in Real Estate.

FIN 359 Quantitative Finance (3)
Prereq: FIN 303; BUS 302/L for Bus. Majors

FIN 425 Entrepreneurial Finance (3)
Prereq: FIN 303; BUS 302/L for Bus. Majors; UDWPE

FIN 430 International Financial Management (3)
Prereq: FIN 303; BUS 302/L for Bus. Majors; UDWPE

FIN 431 Risk Management (3)
Prereq: FIN 303, FIN 336; BUS 302/L for Bus. Majors; UDWPE

FIN 434 Life and Health Insurance (3)
Prereq: FIN 303, FIN 336; BUS 302/L for Bus. Majors; UDWPE

FIN 436 Futures and Options: Theory and Strategy (3)
Prereq: FIN 303, FIN 352; BUS 302/L for Bus. Majors; UDWPE

FIN 437 Advanced Topics in Finance (3)
Prereq: FIN 303, FIN 352; BUS 302/L for Bus. Majors; UDWPE

FIN 438 Management of Financial Institutions (3)
Prereq: FIN 303; BUS 302/L for Bus. Majors; UDWPE

FIN 452 Investment Analysis (3)
Prereq: FIN 303, FIN 352; BUS 302/L for Bus. Majors; UDWPE

FIN 455 Business Valuation (3)
Prereq: FIN 303, FIN 355; BUS 302/L for Bus. Majors; UDWPE

FIN 459 Financial Modeling (3)
Prereq: FIN 303; Grade of “C” or higher in FIN 352, FIN 355 and FIN 359 or instructor’s permission; BUS 302/L for Bus. Majors; UDWPE

FIN 462 Fixed Income Investments (3)
Prereq: FIN 303, FIN 352; BUS 302/L for Bus. Majors; UDWPE

FIN 498 Field Assignments and Reports (3)
Prereq: FIN 303; BUS 302/L for Bus. Majors; UDWPE

ADMISSION TO THE FINANCE MAJOR

Finance is an impacted program, which means that admission to the major is restricted. Students seeking a major in Finance may initially declare a major in Pre-Finance. Pre-Finance majors who have completed 60 units with a minimum cumulative GPA of 2.60 may declare a major in Finance with specific option(s). Students must qualify by the time they earn 90 units.

The B.S. in Finance offers three options: financial analysis, financial planning, and insurance. Students who select the option in Financial Analysis may not double option in Financial Planning or Insurance. Students may double option in Financial Planning and Insurance if they have at least a 3.0 overall GPA and be able to complete ALL requirements within a maximum of 120 units.

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CAREER ADVISEMENT

To explore careers in the financial planning related fields please contact:

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