

FINANCIAL PLANNING & WEALTH MANAGEMENT

CURRICULUM - Suggested sequence for students admitted as of Fall 2014 - Present

<u>First Semester</u>	<u>Credits</u>	<u>Second Semester</u>	<u>Credits</u>
<u>FRESHMAN YEAR</u>			
Microeconomics, ECON 101*	3	Social & Behavior Science Breadth	3
Calculus I, MATH 221*	3	Seminar in Composition, ENGL 110*	3
Basics of Business, BUAD 110%	3	Macroeconomics, ECON 103*	3
Social & Behavioral Science Breadth	3	Creat. Arts & Hum. Breadth (CAH)*	3
Natural Science/Tech. Breadth	<u>3</u>	Natural Science/Tech. Breadth with Lab	<u>4</u>
	15		16
<u>SOPHOMORE YEAR</u>			
ACCT I (Financial), ACCT 207*	3	ACCT II (Managerial), ACCT 208*	3
Statistics I, MATH 201*	3	Statistics II, MATH 202*	3
Bus. Computing, MISY 160	3	Bus Info Sys, MISY 261	3
Hist. & Cult. Change Breadth (HCC)*	3	Principles of Finance, FINC 311*	3
Social & Behavioral Science-ECON course	<u>3</u>	Oral Comm. In Business, COMM 212	<u>3</u>
	15		15
<u>JUNIOR YEAR</u>			
Intro to Marketing, BUAD 301*	3	Bus Law & Soc Issues, ACCT 352	3
Service & Ops. Mgt., BUAD 306*	3	Investments, FINC 314*	3
Org. Behavior, BUAD 309*	3	Retirement Planning, FINC 322*	3
Principles of Fin. Planning, FINC 320*	3	CAH, HCC or Foreign Language	3
Finite Math w/Applic, MATH 230*	<u>3</u>	Free Elective	<u>3</u>
	15		15
<u>SENIOR YEAR</u>			
Income Tax Accounting, ACCT 413* or	3	Estate Planning, ACCT 418*	3
Tax. for Bus. & Inv. Plan., ACCT 313*		Fin. Plan Development, FINC 425*	3
Insurance Planning, FINC 321*	3	ACCT, BUAD, ENTR, FINC or MISY	3
English Writing Requirement	3	elective	
CAH, HCC or Foreign Language	3	Free Elective	3
Free Elective	<u>3</u>	Free Elective	<u>3</u>
	15		15

*Grade of C- or better required in these courses.

%Course satisfies the First-Year Experience (FYE) requirement. Students that matriculated prior to 2013 fall may satisfy this requirement with another course designated as FYE. Students that completed an FYE at the University of Delaware prior to becoming a Financial Planning and Wealth Management major are not required to take BUAD 110.

REQUIREMENTS FOR MAJOR IN FINANCIAL PLANNING & WEALTH MANAGEMENT

(NOTE: All requirements except free electives must be taken for a letter grade. Pass/Fail status courses may only count as free electives.)

University Requirements

- ENGL 110 Seminar in Composition with a minimum grade of C- (3 credits).
- 3 credits of a Multicultural Course.
- Discovery Learning Experience (DLE) (3 credits). This could be a winter, summer or semester study abroad, an internship course, an independent study or an approved experiential learning course. See the DLE website for more information at <http://www.ugs.udel.edu/DLE/>.
- First-Year Experience (FYE) – BUAD 110 Basics of Business. Students that matriculated prior to 2013 fall may satisfy this requirement with another course designated as FYE. Students that completed an FYE at the University of Delaware prior to becoming a Financial Planning and Wealth Management major are not required to take BUAD 110.
- University Breadth Requirements (12 credits with a minimum grade of C-):
All students at the University of Delaware as of fall 2010 are required to take a minimum of 12 credits of University breadth requirements—3 credits each from courses designated as Creative Arts and Humanities, History and Cultural Change, Social and Behavioral Sciences, and Mathematics, Natural Sciences, and Technology. Students must pass these courses with a grade of C- or better. Note that students must take breadth courses from four different subject areas (e.g. the four- letter subject code ACCT, HIST, etc.). Students may not use a course that is cross-listed with a subject area that has already been used to satisfy a university breadth requirement. Students enrolled in a single major may not satisfy the breadth requirement with courses in the subject area of that major (e.g. chemistry majors may not use CHEM courses). Students who are enrolled in more than one major or degree are allowed to meet the University breadth requirement by taking approved breadth courses from within the subject areas of their majors. The requirement may be fulfilled through a course or courses taken to complete other degree requirements, subject to the limitations above; however, credit hours may be counted only once towards the credit hour minimum required for the degree. See the undergraduate catalog at www.udel.edu/catalog for the list of course options.

3 credits from the Creative Arts and Humanities (CAH)

Three credits of Creative Arts and Humanities with a minimum grade of C-. See the undergraduate catalog at www.udel.edu/catalog and then click “majors, minors and University breadth requirements” for the specific list of courses.

3 credits from History and Cultural Change (HCC)

Three credits of History and Cultural Change with a minimum grade of C-. See the undergraduate catalog at www.udel.edu/catalog and then click “majors, minors and University breadth requirements” for the specific list of courses.

6 credits of ADDITIONAL CAH, HCC or Foreign Language Instruction

Six credits from **either** CAH or HCC above or foreign language instruction.

6 credits from the Social and Behavioral Sciences

See the undergraduate catalog at www.udel.edu/catalog and then click “majors, minors and University breadth requirements” for the specific list of courses. (Note: ECON 101, ECON 103, BUAD 301, and BUAD 309 may NOT apply. Only three credits of Economics at the 200-level or above may apply.)

3 credits of Economics

Three credits of Economics – ECON 251 or any Economics course at the 300-level or above.

21 credits of Skills

- Six credits of Mathematics, MATH 221 and 230 or MATH 221 and 210. Allowable substitutions are MATH 241 and 230, MATH 241 and 210, or MATH 241, 242 and 243 all with C- minimum grades.
- Three credits of ENGL 110 with a minimum grade of C- from university requirements above.
- Six credits of Statistics, MATH 201 and 202 with C- minimum grades.
- Six credits of Communication requirements; three credits of COMM 212 and three credits from one of the following: ENGL 301, 312 or 410.

7 credits of Mathematics, Natural Sciences and Technology

See the undergraduate catalog at www.udel.edu/catalog and then click “majors, minors and University breadth requirements” for the specific list of courses. (Note: STAT, MATH, and CISC courses may not apply.) This requirement includes one associated laboratory credit.

15 credits of Free Electives

Free electives include any course, subject to the following:

- A maximum of two credits of BHAN 120 may apply.
- Excess credits from any category above may apply.
- Remedial, “O” level courses may not apply.

If a student elects to take an eligible free elective course for pass/fail grading, a maximum of one pass/fail course may be taken each semester. This is in addition to courses offered only for pass/fail grading.

57 credits of core and major courses

- Students are required to earn at least a "C-" in ECON 101, 103; ACCT 207, 208, 313 or 413, 418; BUAD 301, 306, 309, and FINC 311, 314, 320, 321, 322, and 425.
- CISC 101 may be substituted for MISY 160 until 2015 fall. Students that complete CISC 101 in 2015 fall or after may not substitute the course.
- ACCT, BUAD, MISY, ENTR, or FINC electives are 300-level or higher courses offered through the departments of Accounting and MIS, Business Administration, and Finance. ACCT 302, 350, and 351 do not count toward fulfilling the ACCT, BUAD, MISY, ENTR or FINC elective for majors in Financial Planning. (However, ACCT 302 or MISY 225 may be substituted for MISY 261. Also ACCT 350 and 351 may be substituted for ACCT 352 if completing a double major with Accounting or when switching from Accounting to Financial Planning after having taken these courses.)
- Students may take only one required FINC upper-level course as specified under “Major Areas” at another institution, and only with prior approval.

"WHO'S MY ADVISOR?" Freshmen and sophomores are advised through the Office of Undergraduate Advising and Career Services, Room 103 Lerner Hall. Juniors, seniors and honors students are advised by Mr. Timothy Detwiler or Dr. John Stocker.

Students majoring in Financial Planning are part of the Finance Department. Students admitted to the Alfred

Lerner College of Business & Economics as “business undeclared” may freely elect Accounting, Economics, Economics Education, Finance, Financial Planning, Hotel, Restaurant & Institutional Management, Hospitality Industry Management, International Business Studies, Management, Management Information Systems, Marketing, Operations Management or Sport Management if they do so prior to October 1 of their sophomore year.

Note: Many students take courses through the Winter and Summer Sessions to reduce their regular semester course load. These special sessions normally offer only introductory level courses. If you want to take a course somewhere other than UD, be sure to get the course **pre-approved** by the department that offers the equivalent course and your College’s Assistant Dean. You will need a copy of the course description and/or syllabus. The College or University must be AACSB accredited if the course is in business.

CHECK-OUT SHEET FOR THE FINANCIAL PLANNING & WEALTH MANAGEMENT MAJOR
For students admitted to the University as of Fall 2014 - Present

Name: _____

ID Number: _____

Course	Credits	Grade	Semester
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Creative Arts and Humanities (CAH)

* _____	3	_____	_____
	3		

History and Cultural Change (HCC)

* _____	3	_____	_____
	3		

Additional CAH, HCC or Foreign Languages

_____	3	_____	_____
_____	3	_____	_____
	6		

Social and Behavioral Sciences

(Note: ECON 101, 103, BUAD 301 and 309 may not apply.
Only three credits of Economics may apply.)

_____	3	_____	_____
_____	3	_____	_____
	6		

Economics Elective

^ECON _____	3	_____	_____
	3		

Skills

*ENGL 110	3	_____	_____
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*MATH 221	3	_____	_____
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*MATH 201	3	_____	_____
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*MATH 202	3	_____	_____
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*MATH 230	3	_____	_____
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COMM 212	3	_____	_____
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ENGL 301, 312 or 410		_____	_____
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_____	3	_____	_____
	21		

Natural Sciences and Technology

(Note: CISC, MATH, STAT may not apply.)

_____	4	_____	_____
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_____	3	_____	_____
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	7		
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Free Electives

BUAD 110	3	_____	_____
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15

Core Courses

*ECON 101	3	_____	_____
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*ECON 103	3	_____	_____
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MISY 160	3	_____	_____
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*ACCT 207	3	_____	_____
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*ACCT 208	3	_____	_____
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MISY 261	3	_____	_____
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ACCT 352	3	_____	_____
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*FINC 311	3	_____	_____
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*BUAD 301	3	_____	_____
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*BUAD 306	3	_____	_____
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*BUAD 309	3	_____	_____
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*FINC 425	3	_____	_____
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Major Area

*FINC 314	3	_____	_____
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*FINC 320	3	_____	_____
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*FINC 321	3	_____	_____
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*FINC 322	3	_____	_____
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*ACCT 313 or	3	_____	_____
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*ACCT 413		_____	_____
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*ACCT 418	3	_____	_____
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ACCT, BUAD, ENTR, FINC OR MISY Elec.

Three credits at the 300-level or higher

# _____	3	_____	_____
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3

#ACCT 302, 350 and 351 may not apply.

TOTAL CREDITS: 121

^ECON 251 or any ECON at the 300-level or 400-level

*Grade of C- or better required in these courses.

SPECIAL INSTRUCTIONS

COMPLETE THE UNIVERSITY REQUIREMENTS CHECK-SHEET ON THE NEXT PAGE.

UNIVERSITY REQUIREMENTS CHECK SHEET

University requirements may also fulfill major requirements; however, credit hours may be counted only once towards the credit hour minimum required for the degree.

<u>Requirement</u>	<u>Credits</u>	<u>Grade</u>	<u>Semester</u>
1. First-Year Experience Requirement (FYE) (See http://fye.udel.edu for the list of approved FYE courses). Course: _____	_____	_____	_____
2. Writing Requirement (C- minimum grade) ENGL 110	3	_____	_____
3. Multicultural Requirement (3 credits) (this course must be taken for standard grading) Course: _____	3	_____	_____
4. Discovery Learning Experience Requirement (DLE) (3 credits) (See www.ugs.udel.edu/dle for the list of approved DLE courses). Course(s) _____ _____	_____	_____	_____
5. University Breadth Requirements (12 credits) (C- minimum grade) All students entering the University of Delaware as of Fall 2010 are required to take a minimum of 12 credits of University breadth requirements—3 credits each from courses designated as Creative Arts and Humanities, History and Cultural Change, Social and Behavioral Sciences, and Mathematics, Natural Sciences, and Technology. Students must pass these courses with a grade of C- or better. Note that students must take breadth courses from four different subject areas (e.g. the four- letter subject code ACCT, HIST, etc.). Students may not use a course that is cross-listed with a subject area that has already been used to satisfy a university breadth requirement. Students enrolled in a single major may not satisfy the breadth requirement with courses in the subject area of that major (e.g. chemistry majors may not use CHEM courses). Students who are enrolled in more than one major or degree are allowed to meet the University breadth requirement by taking approved breadth courses from within the subject areas of their majors. The requirement may be fulfilled through a course or courses taken to complete other degree requirements, subject to the limitations above; however, credit hours may be counted only once towards the credit hour minimum required for the degree. See the undergraduate catalog at http://academiccatalog.udel.edu for the list of course options.			
<u>Creative Arts and Humanities (3 credits) (C- minimum grade)</u> Course: _____	3	_____	_____
<u>History and Cultural Change (3 credits) (C- minimum grade)</u> Course: _____	3	_____	_____
<u>Social and Behavioral Sciences (3 credits) (C- minimum grade)</u> Course: _____	3	_____	_____
<u>Mathematics, Natural Sciences, and Technology (3 credits) (C- minimum grade)</u> Course: _____	3	_____	_____
6. Residency Requirement (check one): _____ The first 90 of 100 credits completed at UD _____ The last 30 of 36 credits completed at UD			