

SIGN-OFF SHEET

for the

Professional Certificate in Personal Financial Planning

Required Courses for the Professional Certificate in Personal Financial Planning (21 units total)

1. **FIN 340** – Introduction to Investments
2. **FIN 351** – Introduction to Real Estate
3. **FIN 360** – Principles of Insurance
4. **FIN 408*** – Retirement Planning
5. **FIN 409*** – Estate Planning
*(*Fin 408 and 409 are offered only in **fall** and are pre-reqs for Fin 410)*
6. **ACCT 308** – Concepts of Federal Income Tax Accounting
7. **FIN 410**** – Theory and Practice of Personal Financial Planning
***Fin 410 is offered only in **spring**)*

I understand that I must successfully complete the above set of courses to fulfill the education coursework requirement for CFP® certification, along with all courses required to earn my bachelor degree. Further, I understand that fulfillment of the education coursework requirement for CFP® certification does not guarantee that I will pass the CFP exam or attain CFP® certification.

STUDENT NAME

STUDENT SIGNATURE

DATE