

## **Professional Certificate in Personal Financial Planning Program Roadmap**

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

**FIN 340** – Introduction to Investments

**FIN 351** – Introduction to Real Estate

**FIN 360** – Principles of Insurance

**ACCT 308** – Concepts of Federal  
Income Tax Accounting

**FIN 408\*** – Retirement Planning

**FIN 409\*** – Estate Planning

*(\*Fin 408 and 409 are offered in **fall** only)*



**FIN 410\*\*** – Theory and Practice of  
Personal Financial Planning

*(\*\*Fin 410 is offered in **spring** only.  
Fin 408 & 409 are co-requisites.)*

*FIN 340, FIN 351, FIN 360, ACCT 308, FIN 408, FIN 409 and FIN 410 is the set of courses that make up Mihaylo College's program education coursework requirement for CFP® certification. **Students must complete these courses in order to be eligible to sit for the CFP® certification examination.***

### **Semester Planning**

*Below is a suggested sequence of coursework along with a tentative course offering schedule.*

#### **Semester A**

\_\_\_ **FIN 320**

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*FIN 320 is a prerequisite for all  
financial planning courses*

#### **Semester B**

\_\_\_ **FIN 321**  
\_\_\_ **FIN 340\***  
\_\_\_ **FIN 360\***

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*FIN 321 is a co-requisite for FIN 340*

#### **Semester C**

\_\_\_ **ACCT 308\***  
\_\_\_ **FIN 408\***  
\_\_\_ **FIN 409\***  
\_\_\_ **FIN 351\***

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#### **Semester D**

\_\_\_ **MGMT 449**  
\_\_\_ **FIN 410\***

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*\*Courses that make up Mihaylo College's education coursework requirement for attaining CFP® certification*