CALIFORNIA STATE UNIVERSITY
FULLERTON

College of Business and Economics
Department of Finance
657-278-2217
financedeptasst@fullerton.edu
business.fullerton.edu/finance

STUDENT INFORMATION SHEET

for the

Professional Certificate in Personal Financial Planning

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

1. **ACCT 308** – Concepts of Federal Income Tax Accounting
2. **FIN 328** – General Principles of Professional Financial Planning
3. **FIN 340** – Introduction to Investments
4. **FIN 360** – Principles of Insurance
5. **FIN 408*** – Retirement Planning
6. **FIN 409*** – Estate Planning
   *(*Fin 408 and 409 are co-reqs for Fin 410, though best taken first)*
7. **FIN 410** – Theory and Practice of Personal Financial Planning

FIN 351** *– Introduction to Real Estate*
*(**Fin 351 is recommended but not required)*

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.

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STUDENT NAME **CFP ID #** **PHONE** **Last 4 digits of social security number**

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PERSONAL EMAIL

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STUDENT SIGNATURE **DATE**