CWU

Central Washington University

Fast-Track Your Personal Financial Planning Career

Earn Your Bachelor's & Master's Degree on Your Schedule

Start your journey at a Washington state community college and complete the **Associate in Business- Direct Transfer Agreement (DTA/MRP)**. Seamlessly transition to CWU to earn your **Bachelor's in Business Administration with a specialization in Personal Financial Planning.**

Want to take your career further? You have the option to do one more year and earn your **Master of Business Administration (MBA)**.

What is Personal Financial Planning?

Financial planners help families set financial goals and develop strategies to meet them by analyzing income, expenses, assets, and liabilities. In complex cases, financial planning can also involve investment management, estate planning, education funding, retirement planning, insurance needs analysis, and tax strategy.

Financial planning makes a positive impact on people's lives by helping them make smart decisions, develop good habits, and foster a healthy relationship with money.

Career Projections

- In Washington, positions for Personal Financial Planners are expected to grow by 24% between 2022-2032
- Nationally, 27,000 new positions for Personal Financial Planners are expected to open up annually
- The average salary for Personal Financial Planners in Washington is $112,000*

Career Paths

- Personal Financial Planning
- Wealth Management
- Investment Analyst
- Associate Planner
- Estate Planning Specialist

Why Choose this Path?

- Save time and money with a seamless transfer pathway
- Qualify to sit for the **Certified Financial Planner®** exam upon graduation
- Gain a competitive edge with an advanced degree
- Build valuable connections with faculty and professionals

***This is the 2024 reported average across the industry and experience levels; actual salaries will vary based on region and experience.**

CWU Admissions
509-963-1211 | admissions@cwu.edu

Transfer Center
509-963-1390 | transfer@cwu.edu

Financial Aid
509-963-1611 | finaid@cwu.edu

Early Transfer Admission+
www.cwu.edu/page/eta-plus.php

College of Business
cb@cwu.edu
509-963-2930

CWU
Central Washington University

Your 5-Year Pathway to Success

Years 1 & 2: WA State Community College

Business DTA – Direct Transfer program

Build a strong foundation in business and seamlessly transfer to CWU for your bachelor's degree

Years 3 & 4: CWU

BS in Business Administration-Personal Financial Planning Specialization*

Pursue this program at CWU-Ellensburg or online!

Year 3 – CWU

TERM 1 (15 credits)
FIN 370- Intro to Financial Management
MGT 382- Principles of Management
PFP 310- Introduction to Financial Planning

TERM 2 (15 credits)
SCM 310-Supply Chain Management
BUS 301- Professional Development
PFP 440- Estate Planning
COM 301-Public Speaking for Business

TERM 3 (15 credits)
BUS 310- Professional Development 2
MIS 320- Business Process Analysis and Systems
ACCT 340-Income Tax Accounting I
Open Elective (4 credits)

Year 4 – CWU

TERM 4(15 credits)
PFP 450- Insurance and Risk Management
ENG 311- Business Writing
Open Elective (2 credits)
Open Elective (5 credits)

TERM 5 (15 credits)
MKT 362- Essential Marketing Concepts
PFP 460-Retirement Planning
FIN 475-Investments

TERM 6 (15 credits)
PFP 480- Financial Planning Capstone
MGT 489- Strategic Management
BUS 489- AACSB Assessment
Open Elective (3 credits)

**This is a sample plan of courses, your specific course needs and schedule may vary based on start date and previous courses taken.*

Year 5: CWU - Optional

Master of Business Administration (MBA)

Take the next step and complete your MBA in just one year. With a strong foundation in ethical leadership, sustainability, and real-world problem-solving, CWU's MBA prepares you to lead with purpose and impact.

Start Your Journey Today!

For more information, contact cb@cwu.edu.

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