

2020-2021 Catalog*
B.S. Personal Financial Planning
Total Credit of Major: 113-115

Major Admission Requirements

Minimum Grade of "C-" (1.708) in ENG 101 and 102 (students who have taken MGT 200 in Fall 2018 or after can use it to replace ENG 102 for purposes of admission to the major)
 30 College Credits
 2.25 Cumulative GPA – This is your CWU/Transfer Combined GPA on your Academic Requirement Report
 Good Academic Standing the quarter prior to admission – 2.0 quarterly GPA and cumulative GPA
 Complete the CB Major Declaration Course in Canvas

Foundation Courses that require a minimum grade of a C:

ACCT 251 – Financial Accounting (5) <u>or</u> ACCT 301 – Accounting Skills for Non-Accounting majors (5)
--

Foundation Courses that require a minimum grade of a C- (pre-requisites listed below courses if applicable):

ECON 130 - Foundations of Business Analytics <u>OR</u> MATH 130 – Finite Math (5) <ul style="list-style-type: none"> • <i>C minimum in MATH 100B or satisfactory score on placement exams</i>
BUS 221 – Introductory Business Statistics (5) <ul style="list-style-type: none"> • <i>Minimum grade C- (1.70) in ECON 130 or MATH 130 or higher*</i>
BUS 241 – Legal Environment of Business (5) <ul style="list-style-type: none"> • <i>Sophomore Standing (45 credits)</i>
ECON 201 – Principles of Economics Micro (5)
ECON 202 – Principles of Macro Economics (5) <ul style="list-style-type: none"> • <i>ECON 201</i>

Communication Courses (pre-requisites listed below courses if applicable):

COM 301 – Public Speaking for Business and Organizations (2)
ENG 311 – Business Writing (3) <ul style="list-style-type: none"> • <i>Knowledge Area 2: Academic Writing II or a Direct Transfer Degree</i>

Core Courses that require a minimum grade of a C- (pre-requisites listed below courses if applicable):

BUS 102 – Business Computer Skills (5)
MGT 200 – Essential Skills for Business Professionals (5) <u>or</u> BUS 301– Contemporary Approaches to Personal & Professional Development (3) <ul style="list-style-type: none"> • <i>MGT 200 pre-req: Academic Writing 1 with a minimum grade of a C-</i> • <i>BUS 301 pre-req: Sophomore Standing</i>
MGT 382 – Principles of Management (5) <ul style="list-style-type: none"> • <i>ECON 201 and Full admission to CB Major</i>
MKT 362 – Essential Marketing Concepts (5) <ul style="list-style-type: none"> • <i>BUS 221, ECON 201 and Full admission to CB Major</i>
SCM 310 – Supply Chain Management (5) <ul style="list-style-type: none"> • <i>BUS 221, ECON 201 and Full admission to CB Major</i>
FIN 370 – Introductory Financial Management (5) <ul style="list-style-type: none"> • <i>ACCT 251, BUS 221, ECON 201, and Full admission to CB Major</i>
BUS 489 – AACSB Assessment (2) <ul style="list-style-type: none"> • <i>Must be taken concurrently with PFP 480</i> • <i>Completion of ACCT 251 <u>or</u> ACCT 301, BUS 102, BUS 221, BUS 241, ECON 130 <u>or</u> MATH 130, ECON 201, FIN 370, MGT 382, MKT 362, and SCM 310, with a minimum grade of a C- in each course</i> • <i>Collegiate GPA of 2.25</i> • <i>Senior standing</i> • <i>Completed application of graduation</i>

Personal Financial Planning courses:

Required PFP courses that require completion of ACCT 251 or ACCT 301 with a minimum grade of a C
(additional notes listed below course):

ACCT 303 – Tax Planning for Personal Finance (5)

- *ACCT 340 can be taken as an alternative to ACCT 303, if a student earns a C in both ACCT 251 and 252*

Required PFP courses that require completion of ECON 130, BUS 221, or MATH 153 with a minimum grade of a C-
(additional notes listed below course-requisites listed below courses):

PFP 310 – Introduction to the Financial Planning Profession (5)

- *PFP 310 must be completed with a C to continue with program*

Required PFP courses that require completion of PFP 310 with a minimum grade of a C (additional pre-requisites listed below courses):

PFP 440 – Estate Planning (5)

- *Full admission to CB major*

PFP 450 – Insurance and Risk Management (5)

- *Full admission to CB Major*

PFP 460 – Retirement Planning (5)

- *Full admission to CB Major*

Additional required PFP courses: (pre-requisites listed below courses):

FCL 355 – Family Financial Counseling (4)

- *PFP 310 or permission of instructor*

PFP 386 – Information Technologies for Financial Planning (4)

- *PFP 310 with C minimum and completion of BUS 102*

PFP 475 – Financial Planning Investments (5) or FIN 475 – Investments (5)

- *PFP 475 pre-reqs: (C minimum in PFP 310 and full admission to CB major)*
- *FIN 475 pre-reqs: (C minimum in FIN 370, full admission to CB major and minimum collegiate GPA of 2.25)*

PFP 490 – Personal Financial Planning Internship (1-12) – must be at least 5 credits

- *2.8 CWU cumulative GPA*

Final required PFP course: (pre-requisites listed below courses):

PFP 480 – Financial Planning Capstone (5)

- *C minimum in PFP 310*
- *Completion of PFP 440, PFP 450, PFP 460, PFP 475 or FIN 475, ACCT 303 or ACCT 340*
- *Full admission to CB Major*

Additional Graduation Requirements

To graduate a student must:

Earn a minimum of 180 total credits to graduate from CWU

- *60 of which must be taken at the 300-400 level.*

Earn Minimum GPAs

- *Must have a 2.25 average GPA for all major courses*
- *Must have a 2.25 average GPA for all 300-400 level major courses*

Complete specific amounts of credits in these areas (Applies to all students, including Transfer Students & Post-Baccalaureate)

- *Must complete at least 45 credits at CWU*
- *Must complete at least 40 credits used in their major at CWU*
- *Lower division courses cannot be transferred to meet upper division requirements*

Complete all business courses within the last 10 years

- *Courses taken to fulfill the requirements for a degree from the CWU College of Business must have been taken within the last ten years at the time of graduating.*
- *Exceptions may be made, but must be approved by the department chair and dean or designee.*

***For courses transferred from institutions that use a numerical grading system, the minimum grade is a 1.7 (2.0 if ACCT 251/252 for Accounting majors/minors).**

****Warning: For a timely graduation in your program you must complete specialization courses while taking business core requirements.**

Required PFP courses may only be offered once per year. Refer to the College of Business Tentative Yearly Class Schedules to plan,
www.cwu.edu/business/cbadvising

*****Please refer to the current Central Washington University Undergraduate/Graduate Catalog.**