FIN 330 : Financial Planning

This course is about making sure that values line up with how people spend and save. This course presents the basic theory and structure of individual financial planning and will analyze managing assets, credit, insurance needs, and investments, focusing on investments in stocks, bonds mutual funds, ETFs, and real estate. The course will also focus on insurance needs analyzing income and tax issues as they relate to investments. It will cover the development of lifelong financial, retirement, and estate planning. Students are required to develop an automated financial plan in MS Excel.

Credits 3

Core Requirement

BEC

Prerequisite Courses

FIN 201