Wealth Management Minor

This minor will equip students with the perspectives, conceptual knowledge, and analytical skills necessary to participate successfully in myriad aspects of the wealth management industry, including offering financial planning services to individual and institutional investors. The minor is open to undergraduate students in the Business School and Economics majors who are pursuing the Business Economics Options Program (BEOP). The minor is also designed to help students prepare for participation in the Certified Financial Planner (CFP) certification program.

Admission

Admission to the minor is restricted to students who have declared a business major and economics majors who are pursuing the Business Economics Options Program (BEOP). Admission is based on students' overall academic record, including but not limited to hours and rigor of courses taken in residence, demonstrated interest, and University grade point average.

Total Hours Required: 18

Requirements

Requirements are listed in the table below. Additional requirements may follow the table, so be sure to read the entire page. Some required courses listed below may also satisfy General Education requirements, including Core Curriculum. Students should also review the University's Undergraduate Minor and Certificate Requirements and Policies.

Code	Title	Hours
ACC 364	Fundamentals of Taxation	3
or ACC 355	Introduction to Taxation	
ACC 372T.11	Financial Planning for Wealth Management	3
or FIN 372T.11	Financial Planning for Wealth Management	
FIN 367	Investment Management	3
Elective Courses		
Hours chosen from:		9
CMS 332K	Theories of Persuasion	
FIN 371M	Money and Capital Markets	
FIN 377.1	Portfolio Analysis and Management	
LEB 372T.6	Intergenerational Wealth Transfer	
MKT 372T.11	Brand Management	
or MKT 354.1	Consumer Behavior in a Digital World	
or MKT 372T	Strategic Product Management	
R M 377	Property-Liability Risk Management and Planning	
Total Hours		**18**

Additional Requirements and Policy

- The nine elective hours must be different from courses taken for the students' major; these nine hours cannot simultaneously satisfy any degree requirements except free electives only. Students should carefully choose electives from a field of study different than their major, and should consult their academic advisor.
- Other courses may be considered for substitution, as approved by the Wealth Management Minor Committee.