BACHELOR OF SCIENCE IN BUSINESS ADMINISTRATION IN FINANCE, CERTIFIED FINANCIAL PLANNER TRACK

The Certified Financial Planner (CFP) track focuses on working directly with individuals, helping them to plan for and meet their short- and long-term financial goals. Students must learn to fully understand the client’s financial situation as well as financial laws and legal documents. Investment types commonly dealt with include investments and security planning, estate planning, tax planning, employee benefits planning, and insurance planning.

CAREER OPPORTUNITIES

The demand for qualified personal financial planners is growing rapidly. This demand is due in part to the many Americans who are reaching retirement age in need of personal financial planning expertise. A good financial planner understands investments, taxes, estate planning issues, and how to talk and listen to people. They work in financial services, banks, wealth management companies and independently as entrepreneurs in the field. The demand for qualified personal financial planners is growing rapidly. This is due in part to the many Americans who are reaching retirement age in need of personal financial planning expertise. All business majors are strongly encouraged to complete internships. Internships are career-related work experiences that enable students to apply their knowledge and skills in an organizational setting. In the WCBA, internships that are approved for academic credit must be paid. Completing a career-related internship increases a student’s job opportunities upon graduation.

STUDENT EXPERIENCES

Finance students at Youngstown State University have the opportunity to build their knowledge and leadership skills through a variety of organizations, including the Student Investment Fund.

COURSE TITLE S.H.
FIRST YEAR REQUIREMENT-STUDENT SUCCESS SEMINAR
YSU 1500 Success Seminar 1-2
or SS 1500 Strong Start Success Seminar
or HONR 1500 Intro to Honors
GENERAL EDUCATION REQUIREMENTS
ENGL 1550 Writing 1 3-4
or ENGL 1549 Writing 1 with Support
ENGL 1551 Writing 2 3
CMST 1545 Communication Foundations 3
MATH *Grade of a “C” or higher required
MATH 2623 Quantitative Reasoning 3-6
or MATH 2623C Quantitative Reasoning with Co-Requisite Support
or MATH 1510 College Algebra
or MATH 1510C College Algebra with Co-requisite Support
or MATH 1552 Applied Mathematics for Management
or MATH 1571 Calculus 1
Arts and Humanities (6 SH) 6
Natural Sciences (7 SH) 7
Social Science (6 SH) 5

ECON 2610 Principles 1: Microeconomics *Grade of a “C” or higher 3
ECON 2630 Principles 2: Macroeconomics *Grade of a “C” or higher 3
Social and Personal Awareness (6 SH) 6
BUSINESS TOOL COURSES
Business Tool courses must be completed with the grade of a “C” or higher and cannot be taken credit/no credit.
ACCT 2602 Financial Accounting 3
ACCT 2603 Managerial Accounting 3
BUS 1500 Foundations of Business 3
BUS 2600 Business Applications of Microsoft Excel 3
BUS 2610 Collaborating, Writing, & Presenting in Business 3
BUS 3700 Business Analytics 3
MGT 2604 Legal and Social Responsibilities of Business 3

BUSINESS CORE COURSES
Upper-level business courses must be completed with the grade of a “C” or higher and CANNOT be taken credit/no credit.
BUS 3715 Principles of International Business 3
FIN 3720 Business Finance 3
MGT 3725 Fundamentals of Management 3
MGT 3761 Management Information Systems 3
MGT 3789 Operations Management 3
MKTG 3702 Business Professionalism 1
MKTG 3703 Marketing Concepts and Practice 3
Senior Capstone
MGT 4850 Strategic Management 3
CERTIFIED FINANCIAL PLANNING REQUIRED COURSES
ACCT 4813 Federal Taxation 1 3
ACCT 4815 Estate Planning 3
ECON 3788 Statistics for Business and Economics 1 3
FIN 3715 Planning Your Financial Future 3
FIN 3726 Insurance Planning 3
FIN 3730 Investment Planning 3
FIN 4833 Retirement Plans & Employee Benefits 3
FIN 4838 Financial Plan Development 4
FINANCE UPPER LEVEL COURSE (6 SH) 6
Select two (6 SH) FIN 3000-5000 level courses not included in major requirements. Students should consider at least one internship.
BUSINESS UPPER LEVEL COURSES (6 SH) 6
Select two (6 SH) 3000-5000 level course from the following areas ADV, ACCT, BUS, ENT, ECON, FIN, MGT, MKTG
Free Electives 2
Total Semester Hours 120-125

Year 1
Fall S.H.
YSU 1500 Success Seminar or SS 1500 Strong Start Success Seminar or HONR 1500 Intro to Honors 1-2
ENGL 1550 Writing 1 or ENGL 1549 Writing 1 with Support 3-4
BUS 1500 Foundations of Business 3
CMST 1545 Communication Foundations 3

Bachelor of Science in Business Administration in Finance, Certified Financial Planner Track 1
Bachelor of Science in Business Administration in Finance, Certified Financial Planner Track

MATH 2623 or MATH 2623C or Quantitative Reasoning with Co-Requisite Support
MATH 1510 or MATH 1510C or College Algebra or Calculus 1
MATH 1552 or College Algebra
MATH 1571

Semester Hours 3-6

Spring
ENGL 1551 Writing 2 3
BUS 2610 Collaborating, Writing, & Presenting in Business 3
GE: Lab Science 4
GE: Social & Personal Awareness 3
GE: Arts and Humanities 3

Semester Hours 13-18

Year 2
Fall
ACCT 2602 Financial Accounting 3
BUS 2600 Business Applications of Microsoft Excel 3
ECON 2610 Principles 1: Microeconomics 3
MGT 2604 Legal and Social Responsibilities of Business 3
GE: Arts and Humanities 3

Semester Hours 16

Spring
ACCT 2603 Managerial Accounting 3
ECON 2630 Principles 2: Macroeconomics 3
ECON 3788 Statistics for Business and Economics 1 3
FIN 3715 Planning Your Financial Future 3
MKTG 3702 Business Professionalism 1
GE: Natural Science 3

Semester Hours 15

Year 3
Fall
ACCT 4813 Federal Taxation 1 3
BUS 3700 Business Analytics 3
FIN 3720 Business Finance 3
MGT 3725 Fundamentals of Management 3
GE: Social & Personal Awareness 3

Semester Hours 15

Spring
BUS 3715 Principles of International Business 3
FIN 3726 Insurance Planning (spring term only) 3
FIN 3730 Investment Planning 3
MGT 3761 Management Information Systems 3
Upper-Level FIN Course Internship Recommended 3

Semester Hours 15

Year 4
Fall
ACCT 4815 Estate Planning (fall term only) 3
FIN 4833 Retirement Plans & Employee Benefits (fall term only) 3
MKTG 3703 Marketing Concepts and Practice 3
MGT 3789 Operations Management 3
Upper-Level Business Course 3

Semester Hours 15

Total Semester Hours 120-125

The prerequisite for all upper level business courses includes a minimum 2.5 overall GPA.

Learning Outcomes
1. Students will become familiar with the code of ethics and standards of conduct as they relate to the financial industry.
2. Students will develop a basic understanding of individual finance.
3. Students will understand the foundations of financial risk and portfolio management and apply them across dynamic settings.
4. Students will understand valuation of investment choices and apply them with financial modeling.
5. Students will develop a comprehensive financial plan.