

# Personal Financial Planning Degree

COLLEGE OF HUMAN ENVIRONMENTAL SCIENCES	
<b>Personal Financial Planning</b> Department of Personal Financial Planning Degree Program Requirements	
Degree Program Requirements include General Education courses; HES College requirements; and Professional Program courses. Students must have a <b>2.50 MU Cum GPA</b> based on 50 credit hours and a grade of 2.0 or better in FINPLN 2083, 2183, 3282 and 3283 before being admitted to the professional program.	
<b>GENERAL EDUCATION</b>	
<b>*English: 3 hours</b>	
<input type="checkbox"/> English 1000: Exposition and Argumentation Two writing intensive courses: One must be in the major. Prerequisite: Eng 1000	
<input type="checkbox"/> FINPLN 4380 Assessing the American Dream (3)	
<input type="checkbox"/>	
<b>*Mathematics: 3 hours</b>	
<input type="checkbox"/> Math 1100: College Algebra Math Reasoning Proficiency course. Prerequisite: Math 1100	
<input type="checkbox"/>	
<b>American History or Political Science: 3 hours</b>	
<input type="checkbox"/> Choose from: History 1100, 1200, 1400, 2210, 4220, 4230 Political Science 1100, 1700, 2100	
<b>Distribution of Content: 27 hours</b>	
- 9 hours of Biological, Physical, and/or Mathematical Science with at least one biological or physical science and its related laboratory. Two different areas of science must be completed.	
- 9 hours Social and Behavioral Sciences including at least two different departments.	
- 9 hours Humanities and/or Fine Arts including at least one course from two different departments. (Foreign language is an exception)	
- Choose at least one course numbered 2000 or higher in two of the areas of distribution.	
The list of courses approved for the Distribution of Content may be found at this URL: <a href="http://generaleducation.missouri.edu/requirements/">http://generaleducation.missouri.edu/requirements/</a>	
<b>Biological, Mathematical and Physical Sciences: 9 hours</b> (Recommend MATH 1400 and STAT 2500)	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<b>Social and Behavioral Sciences: 9 hours</b> (Recommend PSYCH 1000, SOC 1000, and Economics)	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<b>Humanistic Studies and Fine Arts: 9 hours</b>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<b>*Capstone Experience</b>	
Complete during last two semesters of coursework.	
<input type="checkbox"/> FINPLN 4389 Case Analysis (3)	
<b>HES COLLEGE</b>	
<b>Foundation Courses: 6-7 hours</b>	
<input type="checkbox"/> ARCHST 1600 Fundamentals of Environ. Design (3)(WT), or ARCHST 2100 Understanding Architecture and the American City (3), or ARCHST 2323 Sustainable Building Design Fundamentals (3) (Phy Sci Lab), or ARCHST 2620 People, Places, & Design (3), or ARCHST 4323 Sustainable Technologies and Systems (3) (Phy Sci & MRP) ARCHST 4430 Design with Historic Preservation (3)	
<input type="checkbox"/> GN HES 1100 Intro to Human Environmental Sciences (1) (Required for freshmen; recommended for transfer students.)	
<input type="checkbox"/> HDFS 1600 Foundations of Family Studies (3), or HDFS 1610 Intimate Relationships and Marriage (3), or HDFS 2400 Principles of Human Development (4)(WT)	
<input type="checkbox"/> NEP 1034 Nutr Current Concepts and Controversies (3), or NEP 1340 Nutr and Fitness (3), or NEP 2222 Landscape of Obesity (3), or NEP 2380 Diet Therapy for Health Prof (3)	
<input type="checkbox"/> SW 1115 Social Welfare and Social Work (3), or SW 2000 Exploration in Social and Econ. Justice System (3), or SW 4710 Social Justice and Social Policy (3)	
<input type="checkbox"/> TAM 1200 Basic Concepts of Apparel Design and Prod. (3), or TAM 1300 Softgoods Retailing (3), or TAM 2200 Textiles (3), or TAM 2400 Global Consumer (3), or TAM 2500 Social Appearance in Time and Space (3)(WT), or TAM 3510 Survey of Western Dress (3)(WT), or TAM 3700 Multi-Channel Retailing (3)	
<b>Communication: 3 hours</b>	
COMMUN 1200 may 'double-count' as Humanities, or COMMUN 3571 may 'double-count' as an upper-level Behavioral Science.	
<input type="checkbox"/> Choose from COMMUN 1200, 3571, or 3575	

\* Courses in these categories must be completed with a grade of C- or better.  
\*\* Courses must be completed with a 2.0 or better.

Effective Fall 2016

**PERSONAL FINANCIAL PLANNING DEGREE** PROGRAMS ARE BECOMING INCREASINGLY POPULAR AS INDIVIDUALS AND FAMILIES SEEK TO MANAGE THEIR FINANCES MORE EFFECTIVELY. WITH THE COMPLEXITIES OF MODERN FINANCIAL MARKETS, A DEGREE IN PERSONAL FINANCIAL PLANNING EQUIPS GRADUATES WITH THE SKILLS AND KNOWLEDGE NECESSARY TO PROVIDE SOUND FINANCIAL ADVICE. THIS ARTICLE WILL EXPLORE WHAT A PERSONAL FINANCIAL PLANNING DEGREE ENTAILS, ITS BENEFITS, POTENTIAL CAREER PATHS, AND THE SKILLS REQUIRED FOR SUCCESS IN THIS FIELD.

## UNDERSTANDING PERSONAL FINANCIAL PLANNING DEGREES

A PERSONAL FINANCIAL PLANNING DEGREE IS TYPICALLY OFFERED AT BOTH UNDERGRADUATE AND GRADUATE LEVELS. THESE PROGRAMS FOCUS ON VARIOUS ASPECTS OF FINANCIAL MANAGEMENT, INCLUDING INVESTMENT STRATEGIES, RETIREMENT PLANNING, TAX STRATEGIES, AND ESTATE PLANNING. STUDENTS IN THESE PROGRAMS ARE TRAINED TO HELP CLIENTS ACHIEVE THEIR FINANCIAL GOALS WHILE MANAGING RISKS AND OPTIMIZING THEIR FINANCIAL RESOURCES.

# CORE CURRICULUM

THE CURRICULUM FOR A PERSONAL FINANCIAL PLANNING DEGREE OFTEN INCLUDES A BLEND OF THEORETICAL KNOWLEDGE AND PRACTICAL SKILLS. COMMON COURSES INCLUDE:

- INTRODUCTION TO FINANCIAL PLANNING
- INVESTMENT ANALYSIS
- RETIREMENT PLANNING
- TAX PLANNING AND STRATEGY
- ESTATE PLANNING
- INSURANCE AND RISK MANAGEMENT
- ETHICS IN FINANCIAL PLANNING
- BEHAVIORAL FINANCE

THESE COURSES PREPARE STUDENTS TO UNDERSTAND COMPLEX FINANCIAL SITUATIONS AND DEVELOP TAILORED SOLUTIONS FOR CLIENTS.

## BENEFITS OF PURSUING A PERSONAL FINANCIAL PLANNING DEGREE

OBTAINING A PERSONAL FINANCIAL PLANNING DEGREE OFFERS SEVERAL ADVANTAGES, MAKING IT AN APPEALING CAREER CHOICE FOR MANY INDIVIDUALS. HERE ARE SOME KEY BENEFITS:

### 1. COMPREHENSIVE KNOWLEDGE BASE

A DEGREE IN PERSONAL FINANCIAL PLANNING PROVIDES STUDENTS WITH A COMPREHENSIVE UNDERSTANDING OF FINANCIAL CONCEPTS. THIS KNOWLEDGE IS ESSENTIAL FOR HELPING CLIENTS NAVIGATE THE OFTEN COMPLICATED WORLD OF FINANCE. GRADUATES ARE WELL-PREPARED TO OFFER INSIGHTS ON INVESTMENTS, INSURANCE, TAXES, AND RETIREMENT STRATEGIES.

### 2. CAREER OPPORTUNITIES

WITH A PERSONAL FINANCIAL PLANNING DEGREE, GRADUATES CAN PURSUE VARIOUS CAREER PATHS, INCLUDING:

- FINANCIAL PLANNER
- INVESTMENT ADVISOR
- WEALTH MANAGER
- INSURANCE CONSULTANT
- TAX ADVISOR

- CORPORATE FINANCIAL ANALYST

THE DEMAND FOR QUALIFIED FINANCIAL PLANNERS CONTINUES TO GROW, DRIVEN BY AN INCREASING NUMBER OF INDIVIDUALS SEEKING PROFESSIONAL ADVICE ON THEIR FINANCIAL MATTERS.

### 3. PROFESSIONAL CREDENTIALS

MANY PERSONAL FINANCIAL PLANNING PROGRAMS ALSO PREPARE STUDENTS FOR PROFESSIONAL CERTIFICATIONS, SUCH AS THE CERTIFIED FINANCIAL PLANNER (CFP) DESIGNATION. EARNING SUCH CREDENTIALS CAN SIGNIFICANTLY ENHANCE A GRADUATE'S CREDIBILITY AND CAREER PROSPECTS.

### 4. THE ABILITY TO MAKE A DIFFERENCE

A CAREER IN PERSONAL FINANCIAL PLANNING ALLOWS PROFESSIONALS TO MAKE A TANGIBLE DIFFERENCE IN PEOPLE'S LIVES. BY HELPING CLIENTS ACHIEVE THEIR FINANCIAL GOALS, FINANCIAL PLANNERS CAN CONTRIBUTE TO THEIR CLIENTS' OVERALL WELL-BEING AND FINANCIAL SECURITY.

## SKILLS REQUIRED FOR SUCCESS IN PERSONAL FINANCIAL PLANNING

TO EXCEL IN THE FIELD OF PERSONAL FINANCIAL PLANNING, CERTAIN SKILLS ARE ESSENTIAL. THESE SKILLS NOT ONLY ENHANCE A FINANCIAL PLANNER'S ABILITY TO SERVE CLIENTS BUT ALSO CONTRIBUTE TO THEIR SUCCESS IN THE INDUSTRY.

### 1. ANALYTICAL SKILLS

FINANCIAL PLANNERS MUST ANALYZE COMPLEX FINANCIAL DATA AND IDENTIFY TRENDS TO MAKE INFORMED RECOMMENDATIONS. STRONG ANALYTICAL SKILLS HELP PLANNERS ASSESS A CLIENT'S FINANCIAL SITUATION AND DEVELOP STRATEGIES THAT ALIGN WITH THEIR GOALS.

### 2. COMMUNICATION SKILLS

EFFECTIVE COMMUNICATION IS CRITICAL IN PERSONAL FINANCIAL PLANNING. FINANCIAL PLANNERS MUST CONVEY COMPLEX FINANCIAL CONCEPTS IN A WAY THAT CLIENTS CAN UNDERSTAND. THEY ALSO NEED TO BE ACTIVE LISTENERS TO GRASP CLIENTS' NEEDS AND CONCERNS FULLY.

### 3. INTERPERSONAL SKILLS

BUILDING TRUST AND RAPPORT WITH CLIENTS IS VITAL FOR SUCCESS IN THIS FIELD. FINANCIAL PLANNERS MUST POSSESS STRONG INTERPERSONAL SKILLS TO FOSTER LASTING RELATIONSHIPS AND ENSURE CLIENTS FEEL COMFORTABLE DISCUSSING THEIR FINANCIAL MATTERS.

### 4. PROBLEM-SOLVING SKILLS

FINANCIAL PLANNERS OFTEN ENCOUNTER UNIQUE CHALLENGES WHEN ADDRESSING CLIENTS' FINANCIAL SITUATIONS. STRONG PROBLEM-SOLVING SKILLS ENABLE PLANNERS TO DEVISE TAILORED STRATEGIES THAT ADDRESS SPECIFIC ISSUES AND HELP CLIENTS ACHIEVE THEIR OBJECTIVES.

## 5. ETHICAL JUDGEMENT

ETHICS PLAY A CRUCIAL ROLE IN FINANCIAL PLANNING. FINANCIAL PLANNERS MUST ADHERE TO HIGH ETHICAL STANDARDS TO MAINTAIN CLIENT TRUST AND ENSURE THAT THEY ACT IN THEIR CLIENTS' BEST INTERESTS.

# CAREER PATHS FOR PERSONAL FINANCIAL PLANNING GRADUATES

GRADUATES OF PERSONAL FINANCIAL PLANNING PROGRAMS HAVE A WIDE ARRAY OF CAREER OPPORTUNITIES. THE FOLLOWING ARE SOME OF THE MOST COMMON ROLES WITHIN THE FIELD:

## 1. FINANCIAL PLANNER

FINANCIAL PLANNERS WORK WITH INDIVIDUALS AND FAMILIES TO CREATE COMPREHENSIVE FINANCIAL PLANS. THEY ASSESS CLIENTS' FINANCIAL SITUATIONS, RECOMMEND INVESTMENT STRATEGIES, AND HELP CLIENTS SET AND ACHIEVE FINANCIAL GOALS.

## 2. INVESTMENT ADVISOR

INVESTMENT ADVISORS SPECIALIZE IN MANAGING CLIENT INVESTMENTS. THEY ANALYZE MARKET TRENDS, RECOMMEND INVESTMENT OPPORTUNITIES, AND HELP CLIENTS BUILD DIVERSIFIED PORTFOLIOS TO MAXIMIZE RETURNS.

## 3. WEALTH MANAGER

WEALTH MANAGERS CATER TO HIGH-NET-WORTH INDIVIDUALS, PROVIDING A RANGE OF FINANCIAL SERVICES, INCLUDING INVESTMENT MANAGEMENT, ESTATE PLANNING, AND TAX STRATEGIES. THEY OFTEN WORK CLOSELY WITH CLIENTS TO DEVELOP LONG-TERM FINANCIAL STRATEGIES.

## 4. CORPORATE FINANCIAL ANALYST

CORPORATE FINANCIAL ANALYSTS WORK WITHIN ORGANIZATIONS TO ANALYZE FINANCIAL DATA, PREPARE REPORTS, AND ASSIST IN BUDGETING AND FORECASTING. THEY PLAY A KEY ROLE IN HELPING COMPANIES MAKE INFORMED FINANCIAL DECISIONS.

## 5. COMPLIANCE OFFICER

COMPLIANCE OFFICERS ENSURE THAT FINANCIAL PLANNING FIRMS ADHERE TO REGULATORY REQUIREMENTS AND ETHICAL STANDARDS. THEY REVIEW PROCESSES AND PRACTICES TO MITIGATE RISKS AND PROTECT CLIENTS' INTERESTS.

## CONCLUSION

A **PERSONAL FINANCIAL PLANNING DEGREE** OFFERS INDIVIDUALS THE OPPORTUNITY TO BUILD A REWARDING CAREER IN A GROWING FIELD. WITH THE NECESSARY KNOWLEDGE, SKILLS, AND ETHICAL GROUNDING, GRADUATES CAN HELP CLIENTS NAVIGATE THE COMPLEXITIES OF PERSONAL FINANCE AND ACHIEVE THEIR FINANCIAL GOALS. AS THE DEMAND FOR PROFESSIONAL FINANCIAL ADVICE CONTINUES TO RISE, PURSUING A DEGREE IN PERSONAL FINANCIAL PLANNING IS AN INVESTMENT IN A FULFILLING AND IMPACTFUL CAREER. WHETHER ONE CHOOSES TO WORK AS A FINANCIAL PLANNER, INVESTMENT ADVISOR, OR IN ANY OTHER RELATED ROLE, THE SKILLS GAINED THROUGH SUCH A DEGREE CAN LEAD TO A SUCCESSFUL AND MEANINGFUL PROFESSIONAL JOURNEY.

## FREQUENTLY ASKED QUESTIONS

### WHAT IS A PERSONAL FINANCIAL PLANNING DEGREE?

A PERSONAL FINANCIAL PLANNING DEGREE IS AN ACADEMIC PROGRAM THAT TEACHES STUDENTS THE PRINCIPLES OF FINANCIAL MANAGEMENT, INVESTMENT STRATEGIES, RETIREMENT PLANNING, ESTATE PLANNING, AND TAX STRATEGIES. THIS DEGREE PREPARES GRADUATES TO HELP INDIVIDUALS AND FAMILIES MANAGE THEIR FINANCIAL RESOURCES EFFECTIVELY.

### WHAT CAREER OPPORTUNITIES ARE AVAILABLE WITH A PERSONAL FINANCIAL PLANNING DEGREE?

GRADUATES WITH A PERSONAL FINANCIAL PLANNING DEGREE CAN PURSUE VARIOUS CAREERS, INCLUDING FINANCIAL PLANNER, INVESTMENT ADVISOR, WEALTH MANAGER, TAX CONSULTANT, AND FINANCIAL ANALYST. THEY CAN WORK FOR FINANCIAL INSTITUTIONS, INSURANCE COMPANIES, OR ESTABLISH THEIR OWN PRACTICE.

### IS A PERSONAL FINANCIAL PLANNING DEGREE WORTH IT?

YES, A PERSONAL FINANCIAL PLANNING DEGREE CAN BE WORTH IT, ESPECIALLY FOR THOSE WHO ARE PASSIONATE ABOUT HELPING OTHERS ACHIEVE THEIR FINANCIAL GOALS. THE DEMAND FOR FINANCIAL PLANNERS IS INCREASING, AND THE POTENTIAL FOR A STABLE INCOME AND CAREER GROWTH MAKES THIS DEGREE A VALUABLE INVESTMENT.

### WHAT COURSES ARE TYPICALLY INCLUDED IN A PERSONAL FINANCIAL PLANNING DEGREE PROGRAM?

TYPICAL COURSES INCLUDE PERSONAL FINANCE, INVESTMENT MANAGEMENT, TAX PLANNING, RETIREMENT PLANNING, ESTATE PLANNING, ETHICS IN FINANCIAL PLANNING, AND RISK MANAGEMENT. SOME PROGRAMS MAY ALSO OFFER COURSES IN BEHAVIORAL FINANCE AND FINANCIAL TECHNOLOGY.

### DO I NEED CERTIFICATION AFTER OBTAINING A PERSONAL FINANCIAL PLANNING DEGREE?

WHILE A PERSONAL FINANCIAL PLANNING DEGREE PROVIDES A SOLID FOUNDATION, OBTAINING CERTIFICATION, SUCH AS THE CERTIFIED FINANCIAL PLANNER (CFP) DESIGNATION, IS OFTEN RECOMMENDED. CERTIFICATION CAN ENHANCE CREDIBILITY, INCREASE JOB OPPORTUNITIES, AND POTENTIALLY LEAD TO HIGHER EARNINGS.

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# Personal Financial Planning Degree

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