

BUAR437: Financial Plan Development

This course provides students an opportunity to demonstrate the knowledge learned through the prerequisite six-course CFP® curriculum. Students will participate in developing a complete financial plan, through the use of case studies and interviewing mock clients. Presentations of a formal financial plan, demonstrating the ability to set client expectations and communicate with clients by answering questions and concerns, are also required.

Credit Hour(s): 3

Prerequisites:

BUAR331

BUAR332

BUAR333

BUAR334

BUAR335

BUAR336

In addition to the courses above, the student must have sophomore status or higher.

Department: [Business and Economics](#)