

Wealth Management and Financial Planning, Certificate

Academic Plan

Sample Plan of Study

Sample plans represent one way to complete a program of study. Actual course selection and sequence will vary and should be discussed with an academic advisor. For additional sample plans, see MyUI.

Wealth Management and Financial Planning, Certificate

Course	Title	Hours
Academic Career		
Any Semester		
The undergraduate certificate in wealth management and financial planning requires a minimum of 18 s.h. of credit.		
Students must maintain a GPA average of at least 2.00 in work for the certificate.		
All coursework for the certificate must be completed at the University of Iowa.		
Courses may be completed in any order unless used as a prerequisite for another course. Consult academic advisor for assistance with reviewing course sequence.		
Hours		0
Third Year		
Fall		
FIN:3200	Investment Management	3
FIN:3401	Personal Insurance and Risk Management	3
Hours		6
Spring		
FIN:4030	Securities Industry Essentials Exam Prep	1
FIN:4340	Wealth Management	3
Hours		4
Fourth Year		
Fall		
FIN:4350	Applied Wealth Management	3
FIN:4440	Employee Benefit Plans	3
Hours		6
Spring		
FIN:4342	Estate and Tax Planning	1
FIN:4344	Financial Planning: A Practitioner's Guide	1
Hours		2
Total Hours		18