Wealth Management and Financial Planning, Certificate

Requirements

The undergraduate Certificate in Wealth Management and Financial Planning requires a minimum of 18 s.h. of credit. Students must maintain a grade-point average of at least 2.00 in work for the certificate. All coursework for the certificate must be completed at the University of Iowa.

The certificate program is open to all current University of Iowa undergraduate students and to individuals who have earned a bachelor's degree and are not enrolled in a UI graduate or professional degree program.

The Certificate in Wealth Management and Financial Planning requires the following coursework.

Course #	Title	Hours
All of these:		
FIN:3200	Investment Management	3
FIN:3401	Personal Insurance and Risk Management	3
FIN:4030	Securities Industry Essentials Exam Prep	1
FIN:4340	Wealth Management	3
FIN:4342	Estate and Tax Planning	1
FIN:4344	Financial Planning: A Practitioner's Guide	1
FIN:4350	Applied Wealth Management	3
FIN:4440	Employee Benefit Plans	3

Students earning the BBA in finance or the BBA in risk management and insurance should be aware that one of FIN:3400 Principles of Risk Management and Insurance or FIN:3401 Personal Insurance and Risk Management may count toward the major, but only FIN:3401 may count toward the certificate.