CONSUMER FINANCE AND
FINANCIAL PLANNING, B.S.

This program provides an opportunity for students to complete the B.S. Consumer Finance and Financial Planning degree at a distance. This option is ideal for returning students with some college credits who would like to complete the program in a flexible online format, with no on-campus attendance required. This program is interdisciplinary with an emphasis on financial management and the economic well-being of individuals and families. Topics include financial counseling, coaching, wealth management, financial product development, financial technology, and consumer behavior. Completion of the program and one additional elective course will make graduates eligible to sit for the Certified Financial Planner® (CFP) exam, which SoHE students pass well above the national average.

HOW TO GET IN

Students applying to the BS in Consumer Finance and Financial Planning program apply through UW-Madison Online (https://online.wisc.edu/). UW–Madison Online undergraduate programs are for those applying as transfer students (i.e., those transferring at least 12 college credits). UW-Madison re-entry students may also be considered. For more information, visit the UW-Madison Online admissions website (https://online.wisc.edu/apply/).

REQUIREMENTS

UNIVERSITY GENERAL EDUCATION
REQUIREMENTS

All undergraduate students at the University of Wisconsin–Madison are required to fulfill a minimum set of common university general education requirements to ensure that every graduate acquires the essential core of an undergraduate education. This core establishes a foundation for living a productive life, being a citizen of the world, appreciating aesthetic values, and engaging in lifelong learning in a continually changing world. Various schools and colleges will have requirements in addition to the requirements listed below. Consult your advisor for assistance, as needed. For additional information, see the university Undergraduate General Education Requirements (http://guide.wisc.edu/undergraduate/#requirementsforundergraduatetestytext) section of the Guide.

General Education

- Breadth—Humanities/Literature/Arts: 6 credits
- Breadth—Natural Science: 4 to 6 credits, consisting of one 4- or 5-credit course with a laboratory component; or two courses providing a total of 6 credits
- Breadth—Social Studies: 3 credits
- Communication Part A & Part B *
- Ethnic Studies *
- Quantitative Reasoning Part A & Part B *

* The mortarboard symbol appears before the title of any course that fulfills one of the Communication Part A or Part B, Ethnic Studies, or Quantitative Reasoning Part A or Part B requirements.

SCHOOL OF HUMAN ECOLOGY
REQUIREMENTS

<table>
<thead>
<tr>
<th>Code</th>
<th>Title</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Math</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MATH 112</td>
<td>Algebra</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Or higher (not MATH 130 or 141) unless exempt through placement exam</td>
<td></td>
</tr>
<tr>
<td>Statistics</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>STAT 301</td>
<td>Introduction to Statistical Methods</td>
<td></td>
</tr>
<tr>
<td>Arts and Humanities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Literature</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Humanities</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>Social Science</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ECON 101</td>
<td>Principles of Microeconomics</td>
<td>4</td>
</tr>
<tr>
<td>ECON 102</td>
<td>Principles of Macroeconomics</td>
<td>3-4</td>
</tr>
<tr>
<td>Choose any designated Social Science breadth course to bring total credits to 9</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Physical, Biological, or Natural Science</td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>Human Ecology Breadth</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Select one Human Ecology course from CSCS, DS, HDFS, or INTER-HE.</td>
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</tbody>
</table>

Total Credits 37-38

BACHELOR OF SCIENCE IN CONSUMER
FINANCE AND FINANCIAL PLANNING
REQUIREMENTS

Core requirements for the major are below. Students should follow the curriculum requirements in place at the time they entered the major. This requirement list should be used in combination with a DARS report. All students declared in the Bachelor of Science in Consumer Finance and Financial Planning major must only take online courses.

Excel Proficiency

Select one course from the following: 1-2

- GEN BUS 106 Foundation Skills for Business Analysis
- A A E 335 Introduction to Data Analysis using Spreadsheets

Personal Finance Core

- CNSR SCI 201 Consumer Insights 3
- CNSR SCI 275 Consumer Finance 3
- ACCT I S 300 Accounting Principles 3
- or ACCT I S 100 Introductory Financial Accounting
- CNSR SCI 477 The Consumer and the Market 3
- CNSR SCI 657 Consumer Behavior 3

Financial Planning Courses

- CNSR SCI 627 Advanced Consumer Finance 3
- CNSR SCI 635 Estate Planning for Financial Planners 3
- CNSR SCI 675 Family Financial Counseling 3
- CNSR SCI 665 Household Risk Management 3
Consumer Finance and Financial Planning, B.S.

Professional Development

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>CNSR SCI 251</td>
<td>Financial Services Leadership Symposium</td>
<td>1</td>
</tr>
<tr>
<td>INTER-HE 202</td>
<td>SoHE Career &amp; Leadership Development</td>
<td>1</td>
</tr>
</tbody>
</table>

Electives

Select electives to bring degree credit total to 120

Total Credits: 30-31

1 CNSR SCI 251 Financial Services Leadership Symposium may be repeated for up to 2 credits. The additional credit will be counted as an elective.

2 ACCT I S/LAW 329 Taxation: Concepts for Business and Personal Planning is a recommended elective for students who want to be eligible to take the Certified Financial Planner (CFP) exam.

UNIVERSITY DEGREE REQUIREMENTS

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Degree</td>
<td>To receive a bachelor's degree from UW–Madison, students must earn a minimum of 120 degree credits. The requirements for some programs may exceed 120 degree credits. Students should consult with their college or department advisor for information on specific credit requirements.</td>
</tr>
<tr>
<td>Residency</td>
<td>Degree candidates are required to earn a minimum of 30 credits in residence at UW–Madison. &quot;In residence&quot; means on the UW–Madison campus with an undergraduate degree classification. &quot;In residence&quot; credit also includes UW–Madison courses offered in distance or online formats and credits earned in UW–Madison Study Abroad/Study Away programs.</td>
</tr>
<tr>
<td>Quality of Work</td>
<td>Undergraduate students must maintain the minimum grade point average specified by the school, college, or academic program to remain in good academic standing. Students whose academic performance drops below these minimum thresholds will be placed on academic probation.</td>
</tr>
</tbody>
</table>

LEARNING OUTCOMES

1. Invoke interdisciplinary and collaborative approaches to understand the interactions between individuals and their social and environmental contexts.
2. Demonstrate the ability to harness, analyze and interpret relevant data for making real world decisions.
3. Acquire professional and life skills related to workplace communication, teamwork, active listening and adapting to technology.
4. Demonstrate an understanding of consumer financial behavior and the role of income, savings, credit, planning, and benefits.

FOUR-YEAR PLAN

This program is designed for transfer students, most of whom will enroll on a part-time basis. As such, there is not a four-year plan for this program. Please refer to the Requirements tab for more information about the curriculum and program plan.

ADVISING AND CAREERS

ACADEMIC ADVISING

Each UW-Madison Online student is assigned an academic and career (AC) advisor (https://online.wisc.edu/academic-career-coach/). The AC advisor will support the academic and personal success of each student by partnering with SoHE advisors in the Student Academic Affairs & Career Development Office (SAA), to assist students as they identify and clarify their educational goals, develop meaningful academic plans, and pursue their own Wisconsin Experience. To find out about other ways UW Madison's campus supports their online learners visit the Academic Support Services page. (https://oss.wisc.edu/support-services/)

CAREER DEVELOPMENT

Active engagement in the career development process is a vital component of a student’s personal growth in college and future success as a lifelong learner, professional, and global citizen. AC advisors (https://online.wisc.edu/academic-career-advisor/) help prepare students for life post-graduation through individual and group advising. The Office of Online Student Success (OSS) (https://oss.wisc.edu/) also provides a number of career resources (https://oss.wisc.edu/resumes/) for online learners.

PEOPLE

PROFESSORS

Bartfeld, Collins, Shim, Wong

ASSOCIATE PROFESSORS

Robb

ASSISTANT PROFESSORS

Ashton, Bea, Harvey, Zhang

FACULTY ASSOCIATES

Andrews, Lepe, Murray, O’Brien, Olive, Sigler, Whelan

FOR MORE INFORMATION, VISIT THE SCHOOL OF HUMAN ECOLOGY FACULTY AND STAFF DIRECTORY (HTTPS://HUMANECOLOGY.WISC.EDU/STAFF/UW_STAFF_TYPE/FACULTY-STAFF/).

CERTIFICATION/LICENSURE

Completion of the BS in Consumer Finance and Financial Planning and one additional elective course will make graduates eligible to sit for the Certified Financial Planner® (CFP) exam.

PROFESSIONAL CERTIFICATION/LICENSURE DISCLOSURE (NC-SARA)

The United States Department of Education requires institutions that provide distance education to disclose information for programs leading to professional certification or licensure about whether each program
meets state educational requirements for initial licensure or certification. Following is this disclosure information for this program:

The requirements of this program meet Certification/Licensure in the following states:

The requirements of this program do not meet Certification/Licensure in the following states:
Not applicable

The requirements of this program have not been determined if they meet Certification/Licensure in the following states:
Not applicable

RESOURCES AND SCHOLARSHIPS

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OTHER FINANCIAL RESOURCES
Grants and loans are available through the Office of Student Financial Aid (https://financialaid.wisc.edu/) (333 East Campus Mall, 608-262-3060).

Additional details on how to save (https://online.wisc.edu/apply/ #details).