

PERSONAL FINANCE: FINANCIAL PLANNING, B.S.

Within the personal finance program, students may choose to complete the financial planning option. This financial planning option is registered with the Certified Financial Planner® Board of Standards. The coursework is interdisciplinary with an emphasis on financial management and the economic well-being of individuals and families. The financial planning option is the more traditional personal finance program leading to careers in counseling, coaching, and wealth management. Graduates of the financial planning option leave fully prepared to sit for the prestigious Certified Financial Planner® exam, which SoHE students pass well above the national average

REQUIREMENTS

PERSONAL FINANCE: FINANCIAL PLANNING

Core requirements for the named option 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.

Code	Title	Credits
Excel Proficiency		
GEN BUS 106	Foundational Skills for Business Analysis	1-2
or 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
CNSR SCI 355	Financial Coaching	3
or CNSR SCI 301	Consumer Analytics	
ACCT I S 100	Introductory Financial Accounting	3
or ACCT I S 300	Accounting Principles	
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
ACCT I S/LAW 329	Taxation: Concepts for Business and Personal Planning	3
Select CNSR SCI 665 or R M I 300 & R M I 620 sequence		3-6
(3 or 6 credits):		
CNSR SCI 665	Household Risk Management	
OR		
R M I 300 & R M I 620	Principles of Risk Management and Employee Benefits Management	
Professional Development		
CNSR SCI 251	Financial Services Leadership Symposium ¹	1

INTER-HE 202	SoHE Career & Leadership Development	1
CNSR SCI 601	Consumer Science Internship	3

Electives	
Select electives to bring degree credit total to 120	
Total Credits	33-37

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.

FOUR-YEAR PLAN

This is a sample four-year plan for Personal Finance: Financial Planning. We encourage all students to consult with their academic advisor to develop an individualized plan that meets their specific needs.

Freshman		
Fall	CreditsSpring	Credits
Communications A	3 Communications B	3-4
Ethnic Studies	3 ECON 101 (Quantitative Reasoning B)	4
MATH 112	3 Humanities	3
Science	3 Science	3
Elective	2 SoHE Breadth	3
14		16-17

Sophomore		
Fall	CreditsSpring	Credits
CNSR SCI 251	1 INTER-HE 202	1
CNSR SCI 275	3 Literature	3
ECON 102	4 Science	3
Humanities	3 Statistics	3
GEN BUS 106 or A A E 335 (Excel proficiency)	1-2 Elective	3
Elective	2	
14-15		13

Junior			
Fall	CreditsSpring	CreditSummer	Credits
ACCT I S 100 or 300	3 CNSR SCI 201	3 CNSR SCI 601	3
CNSR SCI 665	3 CNSR SCI 635	3	
Social Science	3-4 Elective	3	
Elective	3 Elective	3	
Elective	3 Elective	3	
15-16		15	3

Senior		
Fall	CreditsSpring	Credits
CNSR SCI 355 or 301	3 ACCT I S/LAW 329	3
CNSR SCI 627	3 CNSR SCI 675	3
Elective	3 Elective	3

Elective	3 Elective	3
Elective	3 Elective	3
15		15

Total Credits 120-123

PEOPLE

For more information, visit the School of Human Ecology Consumer Science (<https://humanecology.wisc.edu/staff/sohe-department/consumer-science/>) faculty and staff directory (<https://humanecology.wisc.edu/staff/sohe-department/consumer-science/>).