

FINANCIAL PLANNING OPTION

This option is available within the Finance (<https://catalog.oregonstate.edu/college-departments/business/finance-ba-bs-hba-hbs/>) major at the following locations:

- Corvallis
- Ecampus

The Financial Planning Option provides the coursework required to sit for the Certified Financial Planner Certification Exam, a required component for certified financial planners. Coursework includes financial management, investments, and financial, tax, estate, insurance, and retirement-planning that culminates in a Capstone comprehensive financial plan.

Option Code: 029

Options follow the learning outcomes of the major. For this option, refer to the learning outcomes of the Finance (<https://catalog.oregonstate.edu/college-departments/business/school-accounting-finance-information-systems/finance-ba-bs-hba-hbs/#learningoutcomestext>) major.

Code	Title	Credits
BA 240	FINANCE ¹	4
FIN 341	INVESTMENTS ¹	4
FIN 460	PRINCIPLES OF FINANCIAL PLANNING ¹	4
FIN 461	INSURANCE PLANNING	2
FIN 462	TAX PLANNING	2
FIN 463	RETIREMENT PLANNING	2
FIN 464	ESTATE PLANNING	2
FIN 465	FINANCIAL PLANNING CAPSTONE	4
Total Credits		24

¹ Courses may double-count between the Finance major and this option

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