Financial Planning, Graduate Certificate

The Woodbury School of Business (WSB) Master of Financial Planning Analytics (MFPA) program offers a Graduate Certificate in Financial Planning that prepares students for careers in financial planning. This Graduate Certificate helps prepare students for the CFP(R) certification by introducing them to the financial planning profession and includes coursework in investment analysis, portfolio management, risk management, retirement planning, tax planning, and estate planning. The financial planning content is comprehensively integrated in a Capstone course at the conclusion of the Graduate Certificate.

Matriculation Requirements

The university uses a selective admissions process for admitting students to graduate programs. Meeting minimum admissions criteria does not guarantee admission to the graduate program or to the University as a graduate student.

The minimum admissions criteria include the following:

1. Acceptance of an application to the Graduate Certificate in Financial Planning, including payment of the application fee by the established deadline.

2. Official transcripts from all universities attended properly submitted.

3. A bachelor's degree from a regionally accredited college/university, a nationally accredited program, or the international equivalent.

4. A 3.0 or higher cumulative undergraduate GPA or a 3.0 or higher GPA calculated on the last 60 semester hours (90 quarter hours) of undergraduate coursework.

5. For international students whose native language is not English, a TOEFL score of 80 iBT (550 pBT) or higher, or an IELTS band score of 6.5 or higher within the past two years.

6. For international students, all US government requirements for international students must be met.

Program Requirements

Code	Title	Credit Hours
Total Credit Hours		**18**
Discipline Core Requirements		**18 Credits**
FIN 6060	Financial Planning for Professionals	3
FIN 6170	Investment Analysis and Portfolio Analysis	3
FIN 6210	Retirement Planning	3
FIN 6260	Estate Planning	3
FIN 6300	Income Tax Planning	3
FIN 6800	Financial Planning Capstone and Case Analysis	3

Graduation Requirements

1. Complete a minimum of 18 semester credit hours at the graduate level.
2. Earn a grade of C or higher for all courses used to satisfy the graduation requirement.
3. Achieve a cumulative graduate GPA of 3.0 or higher.
4. Complete a minimum of 12 of the graduate program credit hours at Utah Valley University.

Graduation Plan

This graduation plan is a sample plan and is intended to be a guide. Your specific plan may differ based on your Math and English placement and/or transfer credits applied. You are encouraged to meet with an advisor and set up an individualized graduation plan in Wolverine Track (http://www.uvu.edu/wolverinetrack/).

First Year		
Semester 1		**Credit Hours**
FIN 6060	Financial Planning for Professionals	3
FIN 6300	Income Tax Planning	3
	Credit Hours	**6**
Semester 2		
FIN 6170	Investment Analysis and Portfolio Analysis	3

FIN 6210	Retirement Planning	3
FIN 6260	Estate Planning	3
	Credit Hours	**9**
Semester 3		
FIN 6800	Financial Planning Capstone and Case Analysis	3
	Credit Hours	**3**
	Total Credit Hours	**18**

Program Learning Outcomes

1. Apply ethical and fiduciary standards in a financial planning situation.
2. Evaluate a client's financial situation and investments to develop sound financial planning recommendations.
3. Create a comprehensive written financial plan for a client that is professional and integrates all aspects of their financial situation.
4. Present client recommendations in an interactive and professional oral presentation.