



## UCO Certified Financial Planning Courses

### Description:

The University of Central Oklahoma's College of Business now offers CFP Board Registered courses. These seven courses fulfill the Education Requirement for CFP® Certification. For more information on the value of a CFP® Certification and the requirements, visit <http://www.cfp.net/>

### Courses:

<p><b>FIN 3563 – Fundamentals of Business Finance</b> An introductory course in financial management with emphasis on the theoretical concepts, methods, and problems of finance. Summer (OL), Fall &amp; Spring (D, N, OL)</p>	<p><b>FIN 3523 – Foundations of Ins. &amp; Risk Mgmt.</b> Introduces the concept of insurable risk, the risk management process, and the viability of insurance as a risk management solution. Discusses the use of property and liability, life and health, and social insurance. Summer (OL), Fall &amp; Spring (D, OL)</p>
<p><b>FIN 4423 – Employee Benefit Planning</b> Examines various employee benefits, retirement plans, and social programs, including rules and taxation, resulting in analyzing retirement needs. Fall &amp; Spring (N)</p>	<p><b>FIN 4213 – Investments</b> Examines securities markets, various types of securities, risk/return, and other investment theories and strategies, culminating in security and portfolio analysis. Fall &amp; Spring (D &amp; N)</p>
<p><b>LS 4323 - Estate Planning and Administration</b> Examines the fundamentals of the estate planning process, including property transfers, wills, trusts, probates, and various other techniques to implement an effective estate plan. Fall (D or N, alternating)</p>	<p><b>ACCT 3513 – Tax Planning</b> Examines fundamental tax law, characteristics of individual tax topics, and their implications, including calculations of tax liability, to provide tax planning for individuals. Fall (N)</p>
<p><b>FIN 4433 – Case Studies in Financial Planning</b> Uses case studies to integrate the various areas of financial planning in the development of comprehensive financial plans. Regulations, certification, ethical, and professional responsibility issues are examined. Spring (N)</p>	

D - day class, N - night class, OL- online class

**Costs:** Current tuition costs for the completed program are estimated to be \$5800. Students may earn credit for courses already completed prior to enrolling at UCO (saving approx. \$800 per course).

<http://www.uco.edu/em/bursar/student/tuition.asp>

**Enrollment:** Follow this link and click on Post Baccalaureate to enroll

<http://www.uco.edu/em/apply/index.asp>

For information contact: Dr. Julie Cumbie [jcumbie@uco.edu](mailto:jcumbie@uco.edu) or (405)974-5332

Dr. Steve Black [sblack@uco.edu](mailto:sblack@uco.edu) or (405) 974-2159

Ashley Weingart [aweingart@uco.edu](mailto:aweingart@uco.edu) or (405) 974-2474