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## Finance

### FIN200 Introduction to Financial Services

4 Credit Hours

An introduction to the world of financial services, including banking, insurance, and securities/brokerage. Topics include financial planning, treasury management, risk management, financial analysis, and securities investments.

Prerequisite: ACC110

### FIN204 Financial Markets and Institutions

4 Credit Hours

This course is designed to introduce students to the workings of financial markets and institutions. It will explore the role these markets and institutions play in the economy and their relationship to public policy issues.

Prerequisite: FIN200

### FIN250 Computer Applications in Financial Services

2 Credit Hours

An introduction to computer-based problem simulation in the world of financial services. Students learn how to use financial modeling and spreadsheets to solve real-world financial planning problems.

Prerequisites: FIN204, CIS115

### FIN301 Principles of Finance I

4 Credit Hours

Provides an overview of the fundamental principles of financial theory and practice. Students become familiar with the financial organization and operation of a business. Topics include financial analysis, planning and control, budgeting and forecasting, and short- and long-term financing.

Prerequisites: ACC113, MAT212

### FIN305 Principles of Financial Planning

4 Credit Hours

Provides an in-depth analysis of the financial planning process. Topics include the CFP Board's Code of Ethics and Professional Responsibility, emergency fund planning, credit and debt management, financial institutions, educational funding, property titling, and monetary settlement planning.

Prerequisites: FIN204, MAT212

### FIN310 Insurance Planning

4 Credit Hours

Students become familiar with the principles of risk management and insurance planning. Topics include risk exposure; property and casualty insurance; general business liability; and life, health, disability, and long-term care insurance.

Prerequisite: FIN305

### FIN315 Investment Planning

4 Credit Hours

Students learn the principles of constructing and managing investment vehicles in relation to client needs. Topics include an overview of investment vehicles, measures of investment risk and returns, portfolio management, asset pricing, leverage, and hedging options.

Prerequisite: FIN305

### FIN400 Tax Planning

4 Credit Hours

Students learn and analyze the principles of taxation. Topics include income tax fundamentals, trusts and estates, cost recovery, and charitable

contributions.

Prerequisite: FIN305

**FIN405 Retirement Planning**

**4 Credit Hours**

Focuses on the effective planning, implementation, and monitoring of individual and business-sponsored retirement plans. Topics include retirement needs analysis, Social Security, Medicare, and distributions.

Prerequisites: FIN310, FIN315, FIN400

**FIN410 Estate Planning**

**4 Credit Hours**

An introduction to the world of estate planning. Topics include property transfer at death, gifting strategies, incapacity planning, trusts, and charitable giving.

Prerequisites: FIN310, FIN315, FIN400

**FIN415 Principles of Finance II**

**4 Credit Hours**

Analysis of various advanced corporate finance concepts, including investment criteria; the use of techniques and tools such as net present value, internal rate of return, risk and return; cost of capital and long-term financial policy; and short-term financial planning and management.

Prerequisite: FIN301

**FIN420 Personal Financial Planning Capstone**

**4 Credit Hours**

This course will give students the skills necessary to construct a comprehensive personal financial plan based on client information. Students will develop plans that integrate all key areas of personal financial planning.

Prerequisites: FIN405, FIN410