

Berkeley College
Overview

Academic Programs

Admissions and
Finances

Administration,
Faculty, and Staff

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Financial Services Bachelor of Science Degree (B.S.)

This program is only available to continuing students currently enrolled.

Course Requirements

MAJOR COURSES	Qtr. hrs. credit
ACC110 Fundamentals of Accounting for Managers	4

Covers basic financial accounting elements, definitions, and statements. Students learn how to read and understand financial statements and how to use them in making financial business decisions.

ACC113 Managerial Accounting	4
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An introduction to the use of accounting information for management planning, control in budget preparation, and the evaluation of cost behavior. Students learn how to prepare and interpret cash flow statements and make managerial decisions based on financial statement analyses.

Prerequisite: ACC110 or ACC112

FIN200 Introduction to Financial Services	4
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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
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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
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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
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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
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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

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

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

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

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

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

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

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

BUSINESS COURSES	
<p>BUS100 Business Organization and Management</p> <p>Explores the nature and scope of business, examines its component parts, and describes how businesses are organized and managed. Students will learn about the various internal and external forces that comprise our business and economic system.</p>	4
<p>BUS226 Career Management Seminar</p> <p>Explores career development opportunities and strategies. Stresses entry-level job requirements and upward career paths. Covers resume writing skills, interviewing techniques, and the importance of professionalism. Continues the student's orientation to Berkeley College's computer framework, which includes content collection and compiling a professional ePortfolio.</p>	2
<p>BUS231 Business Law I</p> <p>Provides students with detailed knowledge of the laws relating to contracts, commerce, property, sales, negotiable instruments, and employment. Students develop an awareness of business situations requiring legal counsel and a familiarization with the overall structure of the legal system.</p>	4
<p>BUS483 Internship</p> <p>Allows students to work in a position related to their course of study. Students integrate the skills and knowledge learned through their academic experiences and participate in focused online discussions and special online projects.</p> <p>Prerequisites: BUS226 and departmental approval</p>	4
<p>CIS115 Computer Applications</p> <p>An introduction to computer technology with an emphasis on applications. Students learn how to use software packages, such as Microsoft Windows, Word, PowerPoint, and Excel. Includes an orientation to Berkeley College's computer framework, which includes Blackboard, content collection, and portfolio development.</p>	4
<p>CIS201 Advanced Spreadsheets</p> <p>Students gain experience with spreadsheet applications, such as Microsoft Excel. Topics include building complex worksheets; importing and exporting data; using mathematical, financial, and statistical functions; developing macros; consolidating spreadsheets; creating templates; and utilizing "what if" analyses to make business decisions.</p> <p>Prerequisite: CIS115</p>	2
<p>CIS204 Database Management Systems</p> <p>Hands-on experience with well-known database management software applications, such as Microsoft Access. Topics include an introduction to database programming, multiple database files, query files, reports, and the planning, development, and implementation of database systems.</p> <p>Prerequisite: CIS115</p>	2
<p>MGT220 Principles of Management</p>	4

Examines operational theories of management under the functions of planning, organizing, staffing, directing, and controlling. Emphasizes the manager's role in creating and maintaining an internal environment for performance. Students discuss cases in detail.

Prerequisite: BUS100 or prior approval

MKT220 Principles of Marketing 4

Provides an introduction to the fundamental principles and practices in the marketing process. Provides a detailed study of each marketing mix tool (product, price, place, promotion) along with an introduction to marketing research and consumer behavior.

LIBERAL ARTS COURSES*

ENG105 Expository Writing 4

An introduction to expository writing through a comprehensive survey of forms of composition. Students are taught to use words with precision, and strengthen their understanding and application of grammatical and rhetorical principles. Students are encouraged to appreciate and incorporate the principles of academic and professional writing.

ENG106 Writing Through Literature 4

Strengthens the writing, reading, and interpretive abilities introduced in ENG105. Encourages students to develop an appreciation and understanding of various works of literature, and utilize literature to enhance critical thinking and writing.

Prerequisite: ENG105

ENG115 Public Speaking 4

Designed to help students improve oral communication skills. Emphasis is placed on identifying good and poor speech habits, techniques for improving speech, oral interpretation, effective speech planning and delivery, and interpersonal communication.

Prerequisite: ENG106

ENG265 Business Communication 4

Explores the communication strategies and techniques needed for success in the workplace. Students write, revise, and edit business documents; learn techniques for organizing information; and practice the effective use of oral communication skills in business and professional settings.

Prerequisite: ENG106

ENG315 Writing for the Workplace 4

Explores a wide variety of professional and creative writing modes, from personal profiles to blogging and beyond. Students will build their reading, writing, and researching skills, while reinforcing the fundamental concepts and current developments associated with the areas of their respective majors.

Prerequisite: ENG106

GEC123 Introduction to Applied Psychology 4

A required course for first-quarter students that examines basic psychological concepts which can be helpful in

adjusting to the college experience. Some of the subtopics covered include stress management, academic challenges, communication skills, time management, healthy relationships, positive thinking, conflict management, and balancing home/college/work.

MAT211 College Algebra 4

Introduces students to solving problems by using geometric and algebraic approaches and appropriate technology. Topics include the Cartesian coordinate system, linear equations, absolute value, rational and exponential functions, systems of linear equations, and linear inequalities.

Prerequisite: CSK099 or placement

MAT212 Mathematics with Business Applications 4

Introduces students to the personal use of mathematics and the applications for various business disciplines including accounting, fashion marketing and management, financial services, and marketing. Explores the business applications of linear functions, quadratics functions, and systems of linear equations. Emphasis will be placed on the use of Excel to solve real-world business problems.

Prerequisite: CSK099 or placement

MAT215 Statistics I 4

An introduction to statistical methods and procedures. Students become acquainted with the collection, analysis, and presentation of quantitative data. Topics include basic concepts of probability, frequency distributions, binomial distributions, sampling theory, hypothesis testing, and regression and correlation.

Prerequisite: MAT211

SOC201 Macroeconomics 4

An introduction to the study of macroeconomics. Provides a brief history of economics, from Adam Smith to the present. Students will learn the theories of contemporary macroeconomics, as well as their application and impact in today's world.

SOC202 Microeconomics 4

An introduction to the study of microeconomics. Focuses on individual markets and the personal choices concerning those markets. Students gain an understanding of what determines the prices of particular goods and services, as well as what determines the output and profits of individual firms, and wages of individual workers.

Prerequisite: SOC201

SOC231 Human Relations in the Workforce 4

Students will develop the interpersonal skills known to be key ingredients for successful everyday interactions with coworkers, supervisors, and customers/clients at any work environment. Some major skill areas covered in the course include making a good impression with your employer, managing conflict with difficult coworkers, working on a team with diverse groups of people, providing exceptional service for customers/clients, and managing on-the-job stressors.

Humanities Electives 8

Mathematics/Science Electives 8

Social Science Electives	12
Liberal Arts Electives	12
General Education Core Humanities Elective	4
General Education Core Mathematics/Science Elective	4

180 QUARTER CREDIT HOURS REQUIRED FOR GRADUATION

In the final quarter most on-site courses are offered only during the late afternoon and early evening so as not to interfere with internships.

*24 Liberal Arts credits must be at the 300/400 level. Please select 4 credits from the following list of liberal arts courses:

HUM300 The Art of Poetry	4
HUM310 Conflicts in Drama	4
HUM332 Journeys in Fiction	4
HUM451 Telling Stories in the Modern World	4

Berkeley College's B.S., Financial Services program is a registered education program with the CFP Board of Standards, Inc., and therefore qualifies students to sit for the CFP Examination. However, students do not automatically become Certified Financial Planners or Registered Investment Advisors, and such programs are not specifically intended to fulfill all the requirements for certification or registration for such positions. Generally, candidates for such certification or registration may need to complete a combination of specified educational and/or experience requirements, demonstrate good moral character (which may include an absence of criminal convictions), and pass a licensing examination. Applicants for whom such requirements may be matters of concern are strongly advised to contact an Admissions counselor prior to enrolling in a financial services program.

1 [SAMPLE PROGRAM SEQUENCE](#)

1 [B.S., Financial Services Program Statistics](#)