Leeds Personal Financial Planning (PFP) Program

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The financial planning track is a new addition to the tracks available in the finance area of emphasis, beginning fall, 2016. The track is designed to prepare students for a career as a personal financial planner and to take the CFP® certification exam. The development of the program has been fostered by a generous grant from Charles Schwab & Co.

The US Bureau of Labor Statistics indicates that the personal financial advisor category of finance careers, which is already quite large (232,000), will grow 27%, adding 60,300 positions, from 2012-22. Not only will there be large demand for future financial planners, but the compensation is excellent, and job satisfaction of the career is very high.

Students completing the PFP track take 6 courses, including existing required finance courses:

- FNCE 2820—Introduction to Personal Financial Planning
- FNCE 3030—Investments and Portfolio Management
  Note: required of all finance students
- ACCT 3440—Personal Income Taxation
- FNCE 3040—Insurance, risk management, and retirement planning
  Note: replaces FNCE 4040 Derivatives as a requirement
- FNCE 3060—Estate planning
- FNCE 4840—Personal Financial Plan Development (Capstone)
  Note: replaces FNCE 4850 Finance Seminar as a requirement

An emphasis will be placed on mentoring, internships, and placements specific to the personal financial planning field in cooperation with Schwab, local wealth management firms, and planning practitioners.

Scholarships:
Scholarships are available for this program courtesy of Charles Schwab. Contact Tom Nelson (above) for details. To apply, go to: http://www.colorado.edu/business/scholarships

Informational meeting:
Interested in what a career in financial planning is like and how to complete the program of study? Listen to a panel discuss the program and the career.

Careers in Personal Financial Planning Info Session
Wednesday, March 16, 2016, 5pm – 6:30pm
Koelbel Room S135 (BASE classroom)
Refreshments and food included.