

# PERSONAL FINANCIAL PLANNING - CERTIFICATE OF ACCOMPLISHMENT

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Plan Code: 4202

This program will prepare students to learn the concepts of personal financial planning that can be further developed into a career in finance. Students will evaluate various investment products and strategies appropriate for achieving financial goals at different life stages; evaluate the effects of changes in income, deductions, and filing status on an individual's tax liability; and will be able to design and create electronic spreadsheets. Upon completion of this Certificate, a student will have the skills to plan and control financial resources, communicate the most current laws, regulations and forms for tax planning purposes and, finally, unite these skills by creating electronic spreadsheets.

## Program Student Learning Outcomes

- Demonstrate a basic understanding of the language and theories of personal financial planning.
- Identify the role of technology in the world of personal financial planning.

## Program Requirements

Code Number	Course Title	Units
<b>REQUIRED COURSES</b>		
ACCTG 205	Fundamentals of Tax	3
COSA 15	Microsoft Excel for Windows	3
GBUS 10	Personal Finance	3
<b>Total Units</b>		<b>9</b>