Financial Planning Minor Program Guide

Academic Program Guide for students entering the minor Fall 2026 and after
Department of Accounting and Finance

Program Description

The minor in Financial Planning will equip students with essential skills for personal finance and prepares them for careers as financial advisors. Courses will cover financial investments, retirement, and estate planning, wealth transfer, tax, ethics, and other content. Students will meet the educational requirements for the CFP certification. The minor complements majors like accounting, finance, business, or liberal arts as financial planners in industry come from all backgrounds of study. Through a sequence of six courses, students will learn to:

- Analyze and apply financial theories and tools to create effective investment and retirement strategies.
- Evaluate risk and insurance solutions to protect client assets and manage uncertainty.
- Understand tax, estate, and trust planning frameworks to optimize wealth transfer and minimize tax liabilities.
- Develop holistic financial plans that incorporate budgeting, cash flow, investments, insurance, taxes, and retirement.
- Communicate recommendations effectively and ethically, demonstrating fiduciary responsibility and client-centered decision-making.

Prerequisite Requirements to Declare Minor

The following requirements must be satisfied prior to declaring the Financial Planning Minor:

- ◯ Must have a minimum of 12 letter-graded credits completed at Rowan University (transfer credits are not applicable)
- ◯ Must have a minimum 2.500 cumulative GPA
- ◯ Students must have completed Principles of Finance (FIN 04300) with minimum grade of C
- ◯ Must contact a Rohrer College of Business Academic Advisor to declare minor
    - Students who currently have a major declared in the College of Business should contact their assigned advisor. Students majoring outside of the Rohrer College of Business should email rcbminors@rowan.edu.

Minor Requirements (18 sh)

Summary of Minor Requirements

- 18 sh of Required Courses

Course #	Course Name	Notes	Sem/Yr	Grade	Credits
FIN 04350	Personal Financial Planning				3
FIN 04431	Investments				3
FIN 04436	Insurance and Risk Management				3
FIN 04437	Retirement and Estate Planning				3
ACC 03430 or ACC 03432	Individual Taxation or Federal Taxation	Students can choose to take either Individual Taxation or Federal Taxation, but not both			3
FIN 04450	Financial Planning Capstone				3
				Subtotal: 18 sh	

Additional Information

- Students must achieve a 2.5 GPA in minor coursework to be eligible for graduation.
- Students must meet all prerequisites for courses. Please refer to Banner for course prerequisites and ensure courses are taken in the appropriate sequence

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- Have questions about your progress in the minor or general questions about the requirements? Students who currently have a major declared in the College of Business should contact their assigned advisor. Students majoring outside of the Rohrer College of Business should email rcbminors@rowan.edu