Financial Planning at Indiana State University

SCOTT COLLEGE OF BUSINESS
FINANCE MAJOR WITH CONCENTRATION IN FINANCIAL PLANNING

WWW.INDSTATE.EDU/BUSINESS/FINANCE/FINANCIAL-PLANNING
TWITTER @ FINPLANISU

CFP Board Registered Program

THE FINANCIAL PLANNING PROGRAM BEGAN AT ISU IN 2014
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The financial planning concentration provides an approved, practical, and theoretical approach to personal financial planning. Successful completion of the curriculum satisfies the Certified Financial Planner Board of Standards requirements for education and helps to prepare students to take the CFP Board Examination. The concentration provides students with information and analytical skills in financial planning, insurance, investments, portfolio management, employee and retirement benefits, tax planning, and estate planning.

ISU Financial Planning Advisory Board

Valerie L. Chaille, CFP®
SummitView Financial

Michael W. Collins, CFP®, CPA, CLU, ChFC
Northwestern Mutual

Robert J. Edwards, CFA®
Valeo Financial Advisors, LLC

Drew Feutz
Market Street
Wealth Management Advisors

Vince Milnes, CFP ®
Edward Jones

Brian O. Wright, CFP®
UniteWright

Two students attended the 2015 FPA Conference in Boston

Financial planning courses include:

- Introduction to Financial Services
- Introduction to Risk and Insurance
- Introduction to Federal Income Taxation
- Principles of Investments
- Security Analysis & Portfolio Management
- Employee Benefits
- Estate Planning
- Cases in Financial Planning

> ***"All in all, every course that was required, I am applying in my job to some extent."***
>
> ***Financial Planning Graduate, 2014***

2014 Financial Planning Graduates

The Financial Planning Scholarship Fund

Help support financial planning students!

ISU is the only CFP Board Registered Program in Indiana that offers a baccalaureate degree in business. Scholarships will help to attract and retain top quality students to the financial planning program.

Gifts of support may be made via the ISU Foundation to Financial Planning Scholarship

Follow the link at www.indstate.edu/business/finance/financial-planning or contact John Heintz at ***jheintz@indstatefoundation.org*** or 812-514-8464 for more information.