

# Financial Planning at Indiana State University

SCOTT COLLEGE OF BUSINESS  
FINANCE MAJOR WITH CONCENTRATION IN FINANCIAL PLANNING

WWW.INDSTATE.EDU/BUSINESS/FINANCE/FINANCIAL-PLANNING

## CFP Board Registered Program



THE FINANCIAL  
PLANNING PROGRAM  
BEGAN AT  
ISU IN 2014

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.

## 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*



Two students attended the  
2015 FPA Conference in  
Boston



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](http://www.indstate.edu/business/finance/financial-planning) or contact Bill Thompson at [William.Thompson@indstate.edu](mailto:William.Thompson@indstate.edu) or 1-812-237-6124 for more information.