



SAN DIEGO STATE
UNIVERSITY

BUSINESS ADVISING CENTER

FOWLER COLLEGE OF BUSINESS

FINANCIAL SERVICES MAJOR

with Certificate in Personal Financial Planning

UPPER DIVISION REQUIREMENTS FOR 2017-2018 MAJOR CATALOG YEAR

This program is registered with the Certified Financial Planner Board of Standards

The major requires 41 units and the certificate requires an additional 3 units

Business Core	Required for Certification	Prerequisites/Notes
BA 300: Ethical Decision Making in Business (1-unit)		
BA 310:* Foundations of Business in a Global Environment (1-unit) *The BA 310 course and prerequisite is waived for students in Catalog Years prior to 2015/2016		
BA 323: Fundamentals of Finance	X	Minimum grade of C required for Finance majors; Credit or concurrent registration in BA 310*
BA 350: Management & Organizational Behavior		Credit or concurrent registration in BA 310*
BA 360: Introduction to Operations & Supply Chain Management		STAT 119 or ECON 201; Recommended: MATH 120; Credit or concurrent registration in BA 310*
BA 370: Marketing		Credit or concurrent registration in BA 310*
BA 404: Small Business Consulting OR BA 405: International Business Strategy & Integration OR BA 458: Management Decision Games		BA 300, 310*, 323, 350, 360, 370
Financial Services Major		
ACCTG 503: Federal Tax of Individuals	X	ACCTG 201, ACCTG 202 Offered in: Fall, Spring, Summer
FIN 326: Financial Institutions Management		BA 323; This course will not be required beginning with the 2018 Catalog year
FIN 327: Investments	X	BA 323 Offered in: Fall, Spring, Summer
FIN 331: Real Estate Essentials		
FIN 522: Individual Insurance Management	X	Offered in: Fall only
FIN 589: Personal Financial Planning	X	BA 323 Offered in: Fall, Spring
9 units of the following:		
FIN 421: Portfolio Management OR	X	FIN 327 Offered in: Fall, Spring
FIN 427: Derivatives and Financial Risk Management		BA 323
FIN 585: Estate Planning Issues and Practice	X	Offered in: Spring only
FIN 590: Personal Financial Planning Practicum	X	Credit or concurrent registration in FIN 589 or 657 Offered in: Spring only
		MAJOR GPA

For 2017-18 graduates you must have a 2.7 GPA or better in the courses listed to earn the Certificate. After that catalog year, a 2.0 is required. In addition, the major requires a 2.0 average in its classes.

Students must also complete 9 units of upper division General Education (Explorations) and a total of 120 units for the degree.

This is an unofficial advising sheet. Official requirements are based upon catalog copy and issued by the Office of Advising and Evaluations (SSW-1551).