Financial Planning Concentration

The Department of Finance and Real Estate delivers world class education in Financial Planning. The program is a Certified Financial Planner Board of Standards registered program. Successful graduates are eligible to sit for the CFP® Exam upon completion.*

What Do Professionals in Financial Planning Do?

Financial planners assist individuals and families with decisions regarding their personal finances. Comprehensive personal financial planning is the process of formulating, implementing, and monitoring multi-functional decisions that enable an individual or family to achieve their financial goals. Personal financial planning identifies strengths and weaknesses of a financial situation and utilizes this information to provide a framework for decision making from a cost-benefit perspective. Financial planners provide advice or guidance on investments, insurance, taxes, retirement and estate planning.

Common Traits and Skills of Successful Financial Planning Students and Professionals

- Enjoys helping people
- Good counseling skills
- Strong oral and written communication skills
- Can communicate complex info to non-technical audiences
- Likes to master new challenges
- Enjoys problem solving
- Strong analytic and planning skills
- Detail oriented
- Manages time well and meets deadlines
- Keeps abreast of economic trends and investment innovation
- Understands and enjoys working with technology
- Keeps client information strictly confidential

Financial Planning Certification in Colorado

*Certified Financial Planner Board of Standards Inc. owns the certification marks CFP® and CERTIFIED FINANCIAL PLANNER™ in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Tips for Researching Careers in Financial Planning

- Join the Finance Club and run for an office
- Search the web for job profiles and position descriptions
- Talk to alumni of the Finance program
- Attend Career Fairs and ask recruiters about finance jobs
- Take an online assessment (see Career Center website)
- Visit with a Career Counselor in the Career Management Center
- Apply to join the Summit Investment Fund

Potential Careers in Financial Planning

Careers in finance fall broadly into the four categories listed below. There is considerable overlap among the various functional responsibilities, and many planning professionals practice in several areas.

Estate Planning

- Legacy Planner
- Trust Advisor
- Trustee
- Succession Planner

Wealth Management

- Investment Advisor
- Investment Wholesaler
- Portfolio Manager
- Customer Service Provider

Insurance

- Financial Representative
- Insurance Agent
- Annuity Consultant
- Insurance Wholesaler
- Risk Manager

Financial Planning

- Financial Planner
- Life Coach
- Consumer Credit Counselor
- Education Planner
- Retirement Planner

Online Resources

www.dora.state.co.us/securities • www.dora.state.co.us/insurance • www.dora.state.co.us/real-estate • www.acinet.org

Undergraduate Programs
110 Rockwell West
(970) 491-5103
undergradinfo@business.colostate.edu
Advising Appt: csubiz.com/advising

Career Management Center 210
Rockwell West
(970) 491-1540
cob-cmc@business.colostate.edu

COLLEGE OF BUSINESS
COLORADO STATE UNIVERSITY

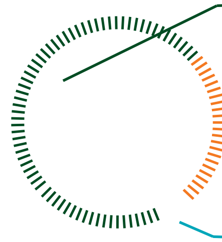
Bachelor of Science in Business Administration

2,300+ Business majors

Financial PLanning (FIN) : 50 Students

20% First generation (first in their family to earn a bachelor's degree)

2.2% Identify as racially or ethnically diverse



70% Colorado residents

30% non-residents

0% international

4.3% Double concentrate

1.9% Double major

Grade Point Average

3.38

Internship, Practicum, and Field Experience Rates

All Concentration Average: 63%

FPL 80%

Average Starting Salary[1]

All Concentration Average: $ 51,283

FPL $ 41,848

Job/Education Offer Rates[2]

All Concentration Average: 93%

FPL 80%

[1] Average salary is based on full-time permanent employment.
[2] Offer rate is the percentage of graduates who are actively seeking employment or education that secured plans or indicated at least one job offer within six months of graduation.