

**Finance Major: *Personal Wealth Management*** (Last Revised 01/2025)

<b>Required Business Core (42 hours)</b>		<b>Credit</b>
ECON 1041	<b>Principles of Macroeconomics</b>	3 hrs.
ECON 1051	<b>Principles of Microeconomics</b> (C- or better in ECON 1041)	3 hrs.
STAT 1772	<b>Intro to Statistical Methods</b> (50 on ALEKS)	3 hrs.
ECON 1011	<b>Statistics for Business Analytics</b> (STAT 1772 <u>OR</u> equivalent)	3 hrs.
ECON 2090	<b>Decision Analytics</b> (STAT 1772 <u>OR</u> equivalent; prerequisite or corequisite: MGMT 2080)	3 hrs.
ACCT 2120	<b>Principles of Financial Accounting</b> (Sophomore standing)	3 hrs.
ACCT 2130	<b>Principles of Managerial Accounting</b> (Sophomore standing; C- or better in ACCT 2120)	3 hrs.
MGMT 2080	<b>Introduction to Information Systems</b>	3 hrs.
MKTG 2110	<b>Principles of Marketing</b> (ECON 1031 <u>OR</u> ECON 1041 <u>OR</u> ECON 1051)	3 hrs.
FIN 3130/5130	<b>Corporation Finance</b> (Junior standing; Wilson College of Business Admittance; ACCT 2120; ECON 1041; ECON 1051; ECON 1011; STAT 1772 <u>OR</u> equivalent)	3 hrs.
MGMT 3965	<b>Organizational Behavior</b> (Junior standing; Wilson College of Business Admittance)	3 hrs.
MGMT 3100	<b>Legal &amp; Social Environment of Business</b> (Junior standing; Wilson College of Business Admittance)	3 hrs.
MGMT 3154	<b>Operations Management</b> (Junior standing; Wilson College of Business Admittance; ACCT 2120; MGMT 2080; ECON 1011; ECON 2090; STAT 1772 <u>OR</u> equivalent)	3 hrs.
MGMT 4175	<b>Strategic Management</b> (Senior standing; completion of rest of Wilson College of Business core)	3 hrs.

<b>Finance Major Requirements (9 hours)</b>		<b>Credit</b>
FIN 3160/5160	<b>Principles of Investments</b> (Junior standing; ACCT 2120; C- or better in FIN 3130/5130; STAT 1772 <u>OR</u> equivalent; ECON 1041; ECON 1051; ECON 1011)	3 hrs.
FIN 3135	<b>Intermediate Financial Management</b> (Junior standing; ACCT 2120; C- or better in FIN 3130/5130; STAT 1772 <u>OR</u> equivalent; ECON 1041; ECON 1051; ECON 1011)	3 hrs.
FIN 4145	<b>Advanced Financial Management</b> (Senior standing; ACCT 2120; C- or better in FIN 3130/5130; FIN 3135; STAT 1772 <u>OR</u> equivalent; ECON 1041; ECON 1051; ECON 1011)	3 hrs.

<b>Personal Wealth Management (9 hours)</b>		<b>Credit</b>
FIN 3040	<b>Introduction to Personal Financial Management</b> (Junior standing; C- or better in FIN 3130/5130; STAT 1772 <u>OR</u> equivalent; ECON 1041; ECON 1051; ECON 1011; ACCT 2120)	3 hrs.
FIN 4270	<b>Applications of Financial Management</b> (Junior standing; ACCT 2120; FIN 3040; C- or better in FIN 3130; STAT 1772 <u>OR</u> equivalent; ECON 1051; ECON 1041; ECON 1011)	3 hrs.
FIN 4040	<b>Principles of Personal Wealth Management</b> (Junior standing; ACCT 2120; FIN 3040; C- or better in FIN 3130; STAT 1772 <u>OR</u> equivalent; ECON 1051; ECON 1041; ECON 1011)	3 hrs.



**Professional Readiness Requirements (0 hours)**

**Credit**

BUSINESS 1000	<b>Introductory Seminar for Business Professionals</b>	0 hrs.
BUSINESS 2000	<b>Business Professionals in Training (Business 1000)</b>	0 hrs.

**Professional Readiness Recommended (0 hours)**

BUSINESS 3000	<b>Intermediate Professional Skills (Business 2000)</b>	0 hrs.
BUSINESS 4000	<b>Advanced Professional Skills (Business 3000)</b>	0 hrs.

**ADMISSION STANDARDS**

STUDENTS SEEKING A MAJOR IN ACCOUNTING, BUSINESS TEACHING, ECONOMICS (BUSINESS ECONOMICS EMPHASIS), FINANCE, REAL ESTATE, MANAGEMENT, HUMAN RESOURCE MANAGEMENT, SUPPLY CHAIN MANAGEMENT, BUSINESS ANALYTICS, MANAGEMENT INFORMATION SYSTEMS, OR MARKETING MUST BE ADMITTED TO THE WILSON COLLEGE OF BUSINESS AND MEET ALL COURSE PREREQUISITES BEFORE TAKING UPPER-DIVISION (3000/4000-LEVEL) WILSON COLLEGE OF BUSINESS COURSES.

Students are eligible for admission to the Wilson College of Business upon completion of the following requirements:

1. 30 Cumulative Semester hours of college credit
2. C- or better in the following Business Core Courses:
  - a. ECON 2090 Decision Analytics OR ECON 1011 Statistics for Business Analytics and
  - b. ECON 1041 Principles of Macroeconomics
3. C- or better in an **approved** English composition course.
4. Total or UNI\* cumulative GPA of at least 2.50 on all university-level courses
5. Declaration of Curriculum form filed with the Office for Professional Distinction (CBB 5)

**GRADUATION STANDARDS**

1. A cumulative UNI GPA of 2.20 or better.
2. A cumulative GPA of 2.20 or better for all Wilson College of Business courses (ACCT, ENTR, MKTG, MGMT, FIN, ECON) taken at UNI.
3. Earn at least 50% of their business credit hours required for the major at UNI.

Copies of the Wilson College of Business admission policy and graduation requirements can be obtained from the Office for Professional Distinction, CBB 5 (tel: 319-273-2144) and can be found online at <http://business.uni.edu/advising>.

**SUGGESTED PROGRAM of STUDY for FINANCE MAJORS**

\*Meet with an advisor to make an official Program of Study\*

**Freshman Year**
**Fall**

STAT 1772 Statistical Methods	3 hrs.
ECON 1041 Prin. of Macroeconomics	3 hrs.
UNIFI / Electives	9 hrs.
BUSINESS 1000 Introductory Seminar for Bus. Prof.	0 hrs.
<b>Total semester hours</b>	<b>15 hrs.</b>

**Spring**

ECON 1051 Prin. of Microeconomics	3 hrs.
ECON 1011 Statistics for Business Analytics	3 hrs.
UNIFI / Electives	6 hrs.
ENGLISH 1005 College Writing and Research	3 hrs.
<b>Total semester hours</b>	<b>15 hrs.</b>

**Sophomore Year**
**Fall**

ACCT 2120 Prin. of Financial Acct.	3 hrs.
MGMT 2080 Intro. to Info. Systems	3 hrs.
UNIFI / Electives	10 hrs.
BUSINESS 2000 Bus. Prof. in Training	0 hrs.
<b>Total semester hours</b>	<b>16 hrs.</b>

**Spring**

ACCT 2130 Prin. of Managerial Acct.	3 hrs.
ECON 2090 Decision Analytics	3 hrs.
UNIFI / Electives	6 hrs.
University Electives	3 hrs.
<b>Total semester hours</b>	<b>15 hrs.</b>

**Junior Year**
**Fall**

MKTG 2110 Prin. of Marketing	3 hrs.
MGMT 3100 Legal & Soc. Environment of Business	3 hrs.
FIN 3130/5130 Corporation Finance	3 hrs.
UNIFI / Electives	3 hrs.
University Electives	3 hrs.
<b>Total semester hours</b>	<b>16 hrs.</b>

**Spring**

MGMT 3965 Organizational Behavior	3 hrs.
FIN 3160/ 5160 Prin. of Investments	3 hrs.
FIN 3135 Intermediate Financial Mgmt.	3 hrs.
UNIFI / Electives	3 hrs.
University Electives	3 hrs.
<b>Total semester hours</b>	<b>15 hrs.</b>

**Senior Year**
**Fall**

MGMT 3154 Operations Management	3 hrs.
Finance Emphasis Courses	6 hrs.
UNIFI / Electives	2 hrs.
University Electives	3 hrs.
<b>Total semester hours</b>	<b>14 hrs.</b>

**Spring**

MGMT 4175 Strategic Management	3 hrs.
FIN 4145 Advanced Fin. Management	3 hrs.
Finance Emphasis Course	3 hrs.
University Electives	6 hrs.
<b>Total semester hours</b>	<b>15 hrs.</b>

**TENTATIVE SCHEDULE of FINANCE CLASSES**

This schedule of courses can be a helpful guide to plan the courses needed to complete a Finance major. It is important to check the current university schedule of classes for courses actually offered in a particular semester. The schedule here can only be tentative, since actual offerings are influenced by uncontrollable factors such as university funding, student interest, and faculty expertise; all of which may not be certain, as far in advance, as when this guide was prepared.

Course Number	Title	(Semester Offered)		
		Fall	Spring	Summer
FIN 1040	<b>Personal Finance Planning &amp; Asset Management</b>	Yes	Yes	No
FIN 3130/5130	<b>Corporation Finance</b>	Yes	Yes	Yes
FIN 3040	<b>Introduction to Personal Finance Planning</b>	Yes	Yes	No
FIN 3160/5160	<b>Principles of Investments</b>	Yes	Yes	Variable
FIN 3135	<b>Intermediate Financial management</b>	Yes	Yes	Variable
FIN 4040	<b>Personal Wealth Management</b>	Yes	Yes	No
FIN 4145	<b>Advanced Financial Management</b>	Yes	Yes	Variable
FIN 3125	<b>Real Estate Finance</b>	Yes	Yes	No
FIN 3170/5170	<b>Commercial Bank Management</b>	Yes	No	No
FIN 4150/5150	<b>Security Analysis</b>	No	Yes	No
FIN 4155/5155	<b>Options/Futures</b>	Yes	No	No
FIN 3032/5032	<b>International Financial Management</b>	Yes	Yes	No
FIN 3065/5065	<b>Fixed Income Analysis</b>	No	Yes	No
FIN 3050	<b>Risk Management and Insurance</b>	Variable	Variable	No
FIN 3055	<b>Insurance Company Operations</b>	Variable	Variable	No
ECON 2132	<b>Money and Banking</b>	Yes	Yes	Variable
FIN 3080	<b>Special Problems in Finance</b>	Variable	Variable	Variable
FIN 3179	<b>Cooperative Education / Internship</b>	Yes	Yes	Yes
FIN 6285	<b>Individual Readings</b>	Variable	Variable	Variable
FIN 6297	<b>Practicum</b>	Variable	Variable	Variable
FIN 6299	<b>Research</b>	Variable	Variable	Variable
FIN 4270	<b>Applications of Financial Planning</b>	Yes	Yes	No

## NOTES ON GENERAL FINANCE

Note 1: Finance and Real Estate majors may declare a double major, and/or major and minor within the Wilson College of Business, subject to the approval of the other Wilson College of Business departments involved. Finance and Real Estate majors minoring within the Wilson College of Business must select minors designated for business majors. Finance majors cannot minor in Finance, and Real Estate majors cannot minor in Real Estate. However, Finance majors may double major or minor in Real Estate, and Real Estate majors may double major in Finance or minor in Finance.

A total cumulative or UNI cumulative GPA of 2.5 is required to declare a double major and/or minor.

Finance majors may declare additional Wilson College of Business majors in one or more of the following areas only: Accounting, Business Teaching, Economics (any emphasis), Management, Marketing, MIS, and Real Estate.

Finance majors minoring within the Wilson College of Business may select only these minors: Real Estate/Business, Economics, International Business/Business and Business Communications.

Note 2: Finance majors are strongly encouraged to take at least nine hours beyond Principles of Managerial Accounting in the accounting area as part of their university electives. This is especially true for those interested in pursuing careers in the financial services industry.

Note 3: Students interested in pursuing graduate study are strongly encouraged to consider an Economics minor and mathematics course work through MATH 1420 Calculus I.

Note 4: All students are urged to consider a minor outside the Wilson College of Business such as foreign language, mathematics, geography, or other areas of personal interest.

Note 5: Finance majors must take Intermediate Finance (FIN 3135) prior to taking Advanced Financial Management.

Note 6: Finance majors may not declare more than one emphasis area.