

PROGRAM FOR PFP DOCTORAL DEGREE AT TTU

Updated 3/10/2023—Effective Fall 2023

Name: _____

R#: _____

CFP BOARD REGISTERED PROGRAM CONTENTⁱ

Course #	Course Name	Hrs.	Planned Date	Completed Date
PFP 5371	Fundamentals of PFP	3		
PFP 5350	Individual Tax Planning Topics	3		
PFP 5377	Psychology of Financial Planning I	3		
PFP 5385	Behavioral Finance	3		
PFP 5394	Retirement Planning	3		
PFP 5397	Risk Management & Insurance	3		
PFP 5398	Estate Planning	3		
PFP 5472	Wealth Management	4		
PFP 6373	PFP Capstone	3		
NOTE: LEVELING COURSES DO NOT APPLY TO THE DEGREE PLAN				

PH.D. FOUNDATIONS

PFP 6301	Academic Leadership in PFP ⁱⁱ	3		
PFP 6305	Introduction to Ph.D. Studies in PFP	3		
PFP 6397	Research Seminar in PFP	3		
REQUIRED CREDIT HOURS		9		

STATISTICS

PFP 6310	Statistics for Financial Planning ⁱⁱⁱ	3		
PFP 6315	Regression Methods for Financial Planning	3		
PFP 6320	Survey of Statistical Techniques in Financial Planning	3		
REQUIRED CREDIT HOURS		9		

THEORY

PFP 6374	Consumer and Household Economic Theory	3		
PFP 6383	Seminar in Regulatory Policy	3		
PFP 6384	Diversity, Equity, and Inclusion in Fin Planning Research ^{iv}	3		
PFP 6394	Psychology of Financial Planning II	3		
REQUIRED CREDIT HOURS		12		

METHODS

PFP 6350	Applied Research Methods I	3		
PFP 6351	Applied Research Methods II	3		
PFP 6377	Research Methods I	3		
PFP 6378	Research Methods II	3		
REQUIRED CREDIT HOURS		12		

ELECTIVES

See next page for options. Complete as many hours as necessary to reach 72 hour degree requirement.^v

DISSERTATION HOURS

PFP 8000	Doctor's Dissertation			
REQUIRED CREDIT HOURS		12		
TOTAL PH.D. PROGRAM HOURS		72		

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ELECTIVES

Course #	Course Name	Hrs.	Planned Date	Completed Date
<i>PFP Practice</i>				
PFP 5380	Professional Technology in PFP	3		
PFP 5395	CFP Review Course	3		
<i>Charitable Financial Planning Certificate (12 hours)</i>				
PFP 5325	Introduction to Charitable Giving	3		
PFP 5326	Advanced Charitable Planning	3		
PFP 5327	Charitable Giving: Research, Theory & Marketing	3		
PFP 5328	Planned Giving Demographics & Decision Making	3		
<i>Financial Health and Wellness Certificate (9 hours)</i>				
<i>PFP 5377, 5378, 6394</i>				
PFP 5378	Interdisciplinary Approaches in Financial Health and Wellness	3		
<i>Life Centered Financial Planning Certificate (9 hours)</i>				
<i>PFP 5377, 5365, 5383</i>				
PFP 5365	Fundamentals of Life-Centered Financial Planning	3		
PFP 5383	Financial Planning with Emotional Intelligence	3		
<i>Teaching, Program, and Professional Development</i>				
PFP 6340	Development and Pedagogy in PFP	3		
PFP 6395	PFP Program Development Seminar	3		
PFP 5175	Special Topics in PFP	1		
PFP 5189	Professional Development in PFP I	1		
PFP 5289	Professional Development in PFP II	2		
PFP 5399	Professional Residency in PFP	3		
FCSE 6343 or EDHE 5342	College Teaching	3		
<i>PFP Research</i>				
PFP 6330	Research Fund Development	3		
PFP 7000	Research (independent study)	3		
<i>Statistics</i>				
AAEC 5307	Applied Econometrics I	3		
AAEC 6311	Applied Econometrics II	3		
ISQS 6348	Applied Multivariate	3		
EPSY 6301	Structural Equation Modeling (SEM) I	3		
EPSY 6349	Advanced Structural Equation Modeling (SEM)	3		
EPSY 6302	Survey Research in Education	3		
ISQS 5330	Decision Theory and Business Analytics	3		
ISQS 6350	Multivariate Analysis	3		
MATH 5099	Machine Learning in Finance (individual study)	3		
POLS 5385	Causal Inference and Quasi-Experimental Methods	3		
CMFT 6342	Advanced Family Therapy Topics (Qualitative)	3		
<i>Finance</i>				
FIN 5325	Security Analysis	3		
FIN 5326	Portfolio Theory	3		
FIN 5328	Option and Futures	3		
FIN 5329	Money and Capital Markets	3		
FIN 5334	Real Estate Finance	3		
REQUIRED CREDIT HOURS		18		

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DEGREE PLAN FLOW – 3 YEARS, FULL-TIME

	Year 1			Year 2			Year 3		
	Fall	Spring	Summer	Fall	Spring	Summer	Fall	Spring	
FOUNDATIONS	Academic Leadership (6301) ^{vi}			Academic Leadership (6301)					
	Introduction (6305)			PFP Seminar (6397)					
STATISTICS	Intro Statistics (6310)	Regression (6315)		Survey of Stats (6320)					
THEORY	DEI (6384) ^{vii}	HH Econ (6374)	Regulatory Policy (6383)		Psych FP (6394)				
METHODS			Applied R1 (6350)	Research 1 (6377)	Research 2 (6378)	Applied R2 (6351)			
ELECTIVES		Elective		Elective	Elective	Elective	Elective	Elective	
QUALIFYING EXAM						Qualifying Exam			
DISSERTATION							Dissertation (8000-6 CH) Defend Proposal	Dissertation (8000-6 CH) Defend Dissertation	
Credit Hours ^{viii}	12	9	6	12	9	6	9	9	72

Pre-requisites:

PFP Seminar (PFP 6397): PFP 6301 & 6305 (pre or co-req)

Regression (PFP 6315): PFP 6310

Survey of Statistics (PFP 6320): PFP 6310 & 6315

Applied R1 (PFP 6350): PFP 6301, 6305, 6397, 6310, 6315 and any 2 theory courses.

Applied R2 (PFP 6351): PFP 6350

Research 1 (PFP 6377): PFP 6350, Pre- or Co-req PFP 6320

Research 2 (PFP 6378): PFP 6377

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DEGREE PLAN FLOW – 4+ YEARS, PART-TIME

	Year 1			Year 2			Year 3			Year 4			
	Fall	Spring	Summer	Fall	Spring	Summer	Fall	Spring	Summer	Fall	Spring	Summer	
FOUNDATIONS	Academic Leadership (6301) ^{ix}			Academic Leadership (6301)			Academic Leadership (6301)			PFP Seminar (6397)			
STATISTICS	Intro Statistics (6310)	Reg-ression (6315)		Survey of Stats (6320)									
THEORY		HH Econ (6374)				Regula-tory Policy (6383)	DEI (6384) ^x	Psych FP (6394)					
METHODS			Applied R1 (6350)	Re-search 1 (6377)	Research 2 (6378)				Applied R2 (6351)				
ELECTIVES						Elective		Elective (2)		Elective	Elective	Elective	
QUALIFYING EXAM									Qualifying Exam				
DISSERTATION										Disserta-tion (8000-3CH)	Dissertation (8000-6 CH) Defend Proposal	Disserta-tion (8000-3 CH) Defend Dissertation	
Credit Hours^{xi}	9	6	3	6	6	3	6	9	3	6	9	6	72

Pre-requisites:

PFP Seminar (PFP 6397): PFP 6301 & 6305 (pre or co-req)

Regression (PFP 6315): PFP 6310

Survey of Statistics (PFP 6320): PFP 6310 & 6315

Applied R1 (PFP 6350): PFP 6301, 6305, 6397, 6310, 6315 and any 2 theory courses.

Applied R2 (PFP 6351): PFP 6350

Research 1 (PFP 6377): PFP 6350, Pre- or Co-req PFP 6320

Research 2 (PFP 6378): PFP 6377

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QUALIFYING EXAM

Qualifying exam target date: _____

To sit for the qualifying exam, students must earn a B or better in these courses:

- ✓ **PH.D. FOUNDATIONS**
 - All courses
- ✓ **STATISTICS**
 - All courses
- ✓ **THEORY**
 - All courses
- ✓ **METHODS**
 - Applied Research Methods I
 - Research Methods I
 - Research Methods II

ⁱ Leveling courses are required for students to be educationally qualified to sit for the CFP® Certification Examination. Upper-division undergraduate, graduate, or certificate coursework may be substituted for PFP-leveling courses at the discretion of the Ph.D. Program Director, typically when students have completed a CFP Board-Registered program. PFP courses are substituted on a course-by-course basis if students show a comparable completed course with a B grade or better on their transcript. Those with an active CFP® certification only need to show course completion to meet substitution requirements.

ⁱⁱ All PhD students must enroll in PFP 6301 (Academic Leadership) the first semester they enter the PhD program. Students continue attending PFP 6301 until the semester they successfully present their dissertation proposal. After that, students are welcome, but are not required to attend PFP 6301.

ⁱⁱⁱ Students may waive if they have a recent graduate level statistics course with a B or better and can pass a leveling statistics examination. Approval is at the discretion of the Ph.D. Program Director in collaboration with the Instructor of Record (IOR).

^{iv} Offered even years only.

^v TTU Graduate School policy on transfer credit: “There is no automatic transfer of credit toward the doctorate degree. On the recommendation of the department or program, the graduate school will review transfer courses for acceptance. Work completed at another graduate school with a grade less than B or pass/fail or satisfactory grades will not be accepted. Transfer credit will not alter the grade point average at Texas Tech University. Up to 12 semester credit hours taken at an accredited institution may be transferred into a doctoral degree plan. Upon approval by the Graduate Dean, up to 30 block semester credit hours of a previously awarded master’s degree may be counted towards a doctoral program. Should such credit be approved, no other transfer credit will be allowed. Credit ordinarily will not be given for transfer work completed more than eight years before admission to a doctoral program at Texas Tech University without exception by the Graduate Dean.”

^{vi} Continuous enrollment. To support the timely and successful completion of your graduate program, you are expected to maintain continuous enrollment in dissertation (8000) credit from the time you begin research work until the degree is completed (summer term included). Enrolling in dissertation credit demonstrates you are actively working on your research and progressing towards degree completion with little to no interruption.

^{vii} Offered even year only. If 1st fall is an odd year, switch 2nd year fall PFP 6397 with PFP 6384.

^{viii} Assistantship credit hour maximum for Fall, Spring, and Summer, is 9/9/6, respectively. Assistantship credit hour exceptions will be granted for PFP 6301, “-mester” classes, and electives. Elective exceptions require excellent assistantship performance, faculty approval, and Assistantship Coordinator approval.

^{ix} Offered even year only. If 3rd fall is an odd year, switch 2nd year fall PFP 6320 with PFP 6384.

^x Assistantship credit hour maximum for Fall, Spring, and Summer, is 9/9/6, respectively. Assistantship credit hour exceptions will be granted for PFP 6301, “-mester” classes, and electives. Elective exceptions require excellent assistantship performance, faculty approval, and Assistantship Coordinator approval.