

**TEXAS TECH UNIVERSITY**  
**MS Personal Financial Planning/MBA**  
**DUAL DEGREE PLAN WORKSHEET**

Name & R# \_\_\_\_\_ Projected Graduation Date \_\_\_\_\_

		Semester	Substitution	Credits
<b>PFP Specialized Courses</b>				
ACCT 5307	Individual Study – Income Tax Planning	_____	_____	3
PFP 5115	Seminar in Personal Financial Planning	_____	_____	1
PFP 5362	Fundamentals of Asset Management	_____	_____	3
PFP 5371	Introduction to Personal Financial Planning	_____	_____	3
PFP 5372	Wealth Management	_____	_____	3
PFP 5373	Personal Financial Planning Capstone	_____	_____	3
PFP 5377	Client Communication and Counseling	_____	_____	3
PFP 5394	Retirement Planning	_____	_____	3
PFP 5398	Estate Planning	_____	_____	3
PFP 5497	Risk Management & Insurance Planning	_____	_____	4
_____	Elective (recommendations below)	_____	_____	<u>1</u>
				<b>30</b>

**MBA Core Courses (12 Hours)**

ACCT 5301	Financial and Managerial Accounting	_____	(Sum I)	3
ISQS 5331	IT for Managers & Operations Mgmt.	_____	(Sum I)	3
ISQS 5345	Statistical Concepts for Business and Mgmt.	_____	(Sum II)	3
MKT 5360	Marketing Concepts and Strategies	_____	(Sum II)	3
MGT 5372	Leadership and Ethics	_____	(Sum I)	3
ISQS 5330	Managerial Decision Theory & Business	_____	(Sum I)	3
FIN 5320	Financial Management Concepts	_____	(Sum II)	3
MGT 5391	Strategic and Global Management-Capstone	_____	(Sum II)	3
BECO 5310	Economic Analysis for Business	_____	(On-line)	
or ECO 5310	Price and Income Theory	_____	(On-line)	3
MGT 5371	Managing Org. Behavior & Org. Design	_____		<u>3</u>
				<b>30</b>

**Recommended PFP Electives**

PFP 5000	CFP Review	_____		1-3
PFP 5175	Special Topics in PFP	_____		1
PFP 5210	Professional Field Experience	_____		2
PFP 5325	Introduction to Charitable Giving	_____		3
PFP 5326	Advanced Charitable Planning	_____		3
PFP 5327	Charitable Giving: Research, Theory & Marketing	_____		3
PFP 5329	Data Analysis and Interpretation	_____		3
PFP 5341	Economic Principles of Financial Decision Making	_____		3
PFP 5350	Individual Tax Planning Topics	_____		3
PFP 5360	Economics of Retirement	_____		3
PFP 5380	Professional Technology in PFP	_____		3
PFP 5385	Behavioral Finance from a PFP Perspective	_____		3

**PFP Faculty Advisor:**

Dr. John Gilliam ([john.gilliam@ttu.edu](mailto:john.gilliam@ttu.edu))  
 Phone: 806-834-8864

**MBA Advisor:**

Kelsey Zickefoose ([Kelsey.zickefoose@ttu.edu](mailto:Kelsey.zickefoose@ttu.edu))  
 Phone: 806-834-1455

Course requirements subject to change.

Students must average a 3.0 GPA to maintain good standing with the Graduate School and to graduate.