

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

Name & R# _____ Projected Graduation Date _____

		Semester	Substitution	Credits
<u>PFP Specialized Courses</u>				
<u>ACCT 5307</u>	<u>Individual Study – Income Tax Planning</u>	_____	_____	3
<u>PFP 5189</u>	<u>Professional Development I</u>	_____	_____	1
<u>PFP 5362</u>	<u>Fundamentals of Asset Management</u>	_____	_____	3
<u>PFP 5371</u>	<u>Introduction to Personal Financial Planning</u>	_____	_____	3
<u>PFP 5372</u>	<u>Wealth Management</u>	_____	_____	3
<u>PFP 5373</u>	<u>Personal Financial Planning Capstone</u>	_____	_____	3
<u>PFP 5377</u>	<u>Client Communication and Counseling</u>	_____	_____	3
<u>PFP 5394</u>	<u>Retirement Planning</u>	_____	_____	3
<u>PFP 5398</u>	<u>Estate Planning</u>	_____	_____	3
<u>PFP 5497</u>	<u>Risk Management & Insurance Planning</u>	_____	_____	4
_____	<u>Elective (recommendations below)</u>	_____	_____	<u>1</u>
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MBA Core Courses (12 Hours)

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

<u>PFP 5000</u>	<u>CFP Review</u>	_____		1-3
<u>PFP 5175</u>	<u>Special Topics in PFP</u>	_____		1
<u>PFP 5210</u>	<u>Professional Field Experience</u>	_____		2
<u>PFP 5325</u>	<u>Introduction to Charitable Giving</u>	_____		3
<u>PFP 5326</u>	<u>Advanced Charitable Planning</u>	_____		3
<u>PFP 5327</u>	<u>Charitable Giving: Research, Theory & Marketing</u>	_____		3
<u>PFP 5328</u>	<u>Planned Giving Demographics & Decision Making</u>	_____		3
<u>PFP 5329</u>	<u>Data Analysis and Interpretation</u>	_____		3
<u>PFP 5341</u>	<u>Economic Principles of Financial Decision Making</u>	_____		3
<u>PFP 5360</u>	<u>Economics of Retirement</u>	_____		3
<u>PFP 5365</u>	<u>Fundamentals of Life-Centered Planning</u>	_____		3
<u>PFP 5380</u>	<u>Professional Technology in PFP</u>	_____		3
<u>PFP 5383</u>	<u>Financial Planning with Emotional Intelligence</u>	_____		3
<u>PFP 5385</u>	<u>Behavioral Finance from a PFP Perspective</u>	_____		3

PFP Faculty Advisor:

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MBA Advisor:

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Course requirements subject to change.

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