



COLLEGE OF BUSINESS ADMINISTRATION

CFP®

Students who successfully complete the courses listed in the Financial Planning Course Requirements section of this brochure are eligible to sit for the CFP® national examination. The CFP® (Certified Financial Planner™) professional designation is a well-known, highly respected designation. Capable students who take all of the courses are urged to take the CFP® exam because the designation commands a valuable premium in the job market.

For more information, contact:

Dr. Gary Stone
Chair, Department of
Accounting, Finance,
and Economics
Winthrop University
305 Thurmond Hall
Rock Hill, SC 29733
803/323-2235
stoneg@winthrop.edu

Dr. Philip Gibson CFP®
Assistant Professor
of Finance
Winthrop University
111 Thurmond Hall
Rock Hill, SC 29733
803/323-2686
gibsonp@winthrop.edu

WINTHROP
UNIVERSITY
ROCK HILL, SOUTH CAROLINA

Financial Planning

The financial planning track is designed for students who want a professional career in financial planning. "Financial Planning" is performed by:

- ◆ Accountants
- ◆ Attorneys
- ◆ Bankers
- ◆ Pension administrators
- ◆ Stock brokers
- ◆ Tax preparers
- ◆ Financial planners

Students contemplating any of the above career paths, and any other careers in the financial services field, should consider the merits of the financial planning track.

"Financial planners" focus their attention on the creation, protection and distribution of wealth for their clients. They gather client data and work with individuals to establish financial goals, evaluate the client's current financial situation, develop financial planning recommendations and alternatives, and implement and monitor the on-going financial plan. Financial planners work with individuals and families. They also work with the owners of small businesses and executives in large corporations and non-profit organizations. In many cases financial planners are part of a team that consists of an accountant, attorney, and an insurance agent.

THE FINANCIAL PLANNING CAREER PATH

1. Employment opportunities:

In recent years financial planners have been among the most in-demand occupations. Banks, insurance companies, investment firms, accounting organizations, and financial planning companies have been the largest employers of Winthrop financial planning students. The Charlotte-Rock Hill area is known for its heavy concentration of these financial service firms.

2. Attractive compensation:

Financial planning students typically start at a higher salary than that of other business graduates. Perhaps more importantly, the compensation of experienced financial planners is extremely attractive.

3. Opportunity to work with people to help them achieve their goals:

Financial planners often report a high level of job satisfaction, and one of the acknowledged reasons is the fact that they help people become successful with an important part of their life. In many cases a financial planner will work with an individual or family for many years.

4. No geographical limitations:

There is a strong demand for financial planners in almost all geographical areas. Planners, therefore, have wide latitude in selecting the location where they want to live—including locations outside the U.S.

FINANCIAL PLANNING COURSE REQUIREMENTS

Students complete 21 hours in finance in addition to completing the universitywide general education requirements and required core courses in the College of Business Administration. Our financial planning students take:

- ◆ FINC 315 Principles of Financial Planning
- ◆ FINC 512 Financial Investments Management
- ◆ FINC 515 Insurance and Risk Management
- ◆ FINC 516 Employee Benefits and Retirement Planning
- ◆ ACCT 401 Introduction to Tax
- ◆ BADM 501 Estate Planning
- ◆ FINC 420 Financial Plan Development