

# Minor in Financial Planning

Department of Agricultural Economics | College of Agriculture and Life Sciences

The minor in Financial Planning is available to all junior and senior undergraduate students enrolled at Texas A&M University. This program prepares students for leadership roles in the financial planning profession. Financial planners advise their clients about financial decisions, including budget management, insurance, investment, taxes, retirement, and estate planning. The six-course curriculum (18 credit hours) also satisfies the educational requirements to be eligible to sit for the CERTIFIED FINANCIAL PLANNER™ (CFP®) exam.

Courses must be taken for academic credit with a grade of 'C' or better for each course. Students must be in good academic standing.

## Required courses:

Course #	Course Title	Hours	Typically Offered
AGEC 435	Financial Planning for Professionals	3 hours	Spring, Summer, Fall
AGEC 436	Insurance and Estate Planning	3 hours	Spring
AGEC 437	Tax Planning	3 hours	Summer
AGEC 438	Investment Planning	3 hours	Fall
AGEC 439	Retirement Planning	3 hours	Spring, Fall
AGEC 441	Financial Planning Capstone	3 hours	Spring, Summer

## Prerequisites:

Minimum 2.5 overall GPA, or approval from the program director

AGEC 435: AGECE 330 or FINC 409 or FINC 341; junior or senior classification.

AGEC 436, 437, 438, and 439: AGECE 435 or AGECE 330 or FINC 409 or FINC 341; junior or senior classification.

AGEC 441: AGECE 435, AGECE 436, AGECE 437, AGECE 438, and AGECE 439

## Availability of courses and minor recognition:

The table above outlines the semester(s) each course is typically offered. This schedule is subject to change, so please consult the Financial Planning program (979.845.5223) to confirm course scheduling. Successful completion of the minor will be certified by a degree audit in Compass during the semester of the student's graduation. The minor will be recognized on the student's transcript after graduation. The minor designation will not appear on the student's diploma.

**Please bring the completed form to AGLS Room 210c. Questions? Contact us at 979.845.5223.**

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First Name

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Middle Initial

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Last Name

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Date

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Major

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UIN

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Phone Number

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Expected Graduation Date

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Student Signature

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Advisor's name

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Financial Planning Program Signature

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Date

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Advisor Signature

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AGEC Approval

**Compass Minor code: FINP**