

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	Summer
AGEC 441	Financial Planning Capstone	3 hours	Spring, Summer

Prerequisites:

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

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

AGEC 441: AGEC 435, AGEC 436, AGEC 437, AGEC 438, and AGEC 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.

First Name Middle Initial Last Name

Date Major UIN

E-mail Phone Number Expected Graduation Date

Student Signature Advisor's name

Financial Planning Program Signature Date Advisor Signature

AGEC Approval

Compass Minor code: FINP

Please send a copy of the form with all signatures to the Financial Planning Program: financialplanning@tamu.edu - MS 2124.