

WEALTH MANAGEMENT MINOR

This minor provides a solid understanding of the concepts and techniques used by wealth management and insurance advisors and practitioners to assist individual and institutional clients. Students will gain the necessary skills to help individuals and firms meet the expanding needs of their client base. This minor also facilitates obtaining necessary coursework for important career and professional certification such as Certified Financial Analysts (CFA), Certified Financial Planners (CFP), Certified Insurance Counselors (CIC), and Certified Risk Managers (CRM).

About this Program

- **College:** Heavener School of Business (<http://catalog.ufl.edu/UGRD/colleges-schools/UGBUS/>)
- **Credits:** 28 | Completed with an overall 2.0 GPA in the minor and a cumulative 2.0 UF GPA

School Information

One of the nation's top-ranked undergraduate public business schools, the Heavener School of Business offers degrees in Finance, General Business, Management, Information Systems & Operations Management, and Marketing.

Website (<https://warrington.ufl.edu/about/heavener/>)

CONTACT

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Map (<http://campusmap.ufl.edu/#/index/0065>)

Curriculum

- Business Administration Minor
- Business Administration Minor UF Online
- Business Administration | General Business | BSBA UF Online
- Business Administration | General Studies | BABA
- Business Administration | General Studies | BABA UF Online
- Combination Degrees
- Wealth Management Minor

All upper-division courses must be taken for letter grade at UF or via an approved study abroad program.

Flexible learning courses will not count toward the minor.

Courses required for this minor require specific sequencing; students should meet with an Academic & Career Advisor in the Heavener School of Business as soon as they begin considering this minor to ensure appropriate planning and timing of the completion of each requirement.

Required Courses

Code	Title	Credits
ACG 2021	Introduction to Financial Accounting	4
ECO 2023	Principles of Microeconomics	4
FIN 3124	Introduction to Financial Planning & Wealth Management	4
FIN 3403	Business Finance	4
FIN 4128	Financial Plan Development	4
FIN 4132	Estate & Tax Planning	4
RMI 3011	Risk Management and Insurance	4
Total Credits		28