

Master of Science in Finance Financial Planning & Wealth Management

This worksheet is intended to help you plan your course enrollments to be sure that they align with the Master of Science in Finance: Financial Planning & Wealth Management curriculum. Use this worksheet along with Degree Works to track your progress toward program completion. **Please note in order to graduate students must:**

- Complete all degree requirements within five years
- Earn a minimum of 2.7 cumulative GPA

Advising Guidance:

- Only foundation courses may be waived.
- Students must complete all required prerequisites before taking a course, including any prerequisite sequences. For example: FI 623 -> FI 760 -> FI 761 -> FI 762

| Course | Title | Prerequisite |
|---------------------------|----------------------------------|-----------------------------------|
| Total | | 30 - 42 credits · 10 - 14 courses |
| Foundation Courses | | 9 credits · 3 courses |
| GR 521 | Managerial Statistics | None |
| GR 522 | Economic Environment of the Firm | None |
| GR 524 | Accounting for Decision-Making | None |

| Required Courses | | 27 credits · 9 courses |
|-------------------------|---|---|
| FI 623 | Investments | None |
| FI 625 | Corporate Finance: Theory, Tools & Concepts | GR 524 |
| FI 627 | Corporate Finance: Applications and Advanced Topics | GR 525 or FI 625. MSF students must take FI 625 |
| FI 631 | Financial Modeling | GR 525 or FI 625 |
| FI 751 | International Financial Management | GR 525 or FI 625 |
| FI 760 | Financial Planning Fundamentals | Pre or Co-Req FI 623 |
| FI 761 | Insurance, Retirement and Estate Planning | Pre-req FI 760 |
| FI 762 | Comprehensive Financial Plan Development | Pre-req FI 761 |
| ST 625 | Quantitative Analysis for Business | GR 521 |

Elective Courses

3 credits · 1 course

One graduate course at the 600-level or higher

Master of Science in Finance

Financial Planning & Wealth Management



Name:

Matriculation Date:

Bentley ID:

Anticipated Completion Date:

| Course Number & Title | Cr. | Summer | Fall | Spring | Note |
|---|-----|--------|------|--------|------------------------|
| Foundation Courses | | | | | 9 credits · 3 courses |
| 1. GR 521 Managerial Statistics | 3 | | | | |
| 2. GR 522 Economic Environment of the Firm | 3 | | | | |
| 3. GR 524 Accounting for Decision-Making | 3 | | | | |
| Required Courses | | | | | 27 credits · 9 courses |
| 1. FI 623 Investments | 3 | | | | |
| 2. FI 625 Corporate Finance: Theory, Tools & Concepts | 3 | | | | |
| 3. FI 627 Corporate Finance: Applications and Advanced Topics | 3 | | | | |
| 4. FI 631 Financial Modeling | 3 | | | | |
| 5. FI 751 International Financial Management | 3 | | | | |
| 6. FI 760 Financial Planning Fundamentals | 3 | | | | |
| 7. FI 761 Insurance, Retirement and Estate Planning | 3 | | | | |
| 8. FI 762 Comprehensive Financial Plan Development | 3 | | | | |
| 9. ST 625 Quantitative Analysis for Business | 3 | | | | |
| Elective Courses | | | | | 3 credits · 1 courses |
| 1. | 3 | | | | |
| Total Credits | | | | | |

Note: