

Personal Financial Planning

The personal financial planning major provides students with specialized knowledge in the area of personal financial planning. The personal financial planning major is registered with the Certified Financial Planner (CFP ®) Board. As a result, students who take the recommended courses meet the educational requirements to sit for the CFP exam. The professional CFP exam is rigorous and requires additional preparation. Courses cover topics such as valuation of securities, insurance, estate planning, retirement planning and employee benefits. Personal financial planning students are also eligible to apply for admission to the Student Managed Investment Fund class, in which students manage a portfolio of around \$700,000 of real money under the direction of an experienced money manager.

Do Research

Selecting a major that aligns with your interests, personality, skills and abilities is an important part of your career development. The websites below will help you learn more about personal financial planning.

Personal Financial Planning Websites

WMU Finance Department: www.wmich.edu/finance

Careers in Finance: www.careers-in-finance.com

Financial Job Network: www.fjn.com

National Banking and Financial Services Network: www.nbn-jobs.com/home/index.cfm

Jobs in the Money: www.jobsinthemoney.com

General Websites

The Haworth College of Business Career Center: www.wmich.edu/business/career

O-NET Dictionary of Occupational Titles: www.onetonline.org

Occupational Outlook Handbook: www.bls.gov/oco

CareerTV: www.careertv.com

Get Involved

Becoming involved in an organization is an essential part of your career development. The websites below are for WMU registered student organizations and national and international professional organizations related to the personal financial planning major.

WMU Financial Management Association: www.rso.wmich.edu/fmai

WMU Financial Services Club: <http://wmich.collegiatelink.net/organization/fscwmich>

Financial Management Association: www.fma.org

Association for Financial Planners: www.afponline.org

Academy of Financial Services: www.academyfinancial.org

Society of Financial Service Professionals: www.financialpro.org

Explore Opportunities

Exploring companies that hire personal financial planning majors is a great way to get a sense of the field. The companies below recruit business students and are a great place to start exploring personal financial planning jobs.

- Ameriprise Financial
- Charles Schwab
- Comerica
- Edward Jones
- Greenleaf Trust
- JP Morgan
- Merrill Lynch
- New York Life
- Patriot Capital
- Plante & Moran
- Prudential Financial
- Raymond James
- Zhang Financial