

## ***MBA Financial Planning***

The Master of Business Administration in Financial Planning is designed specifically for the student interested in earning an MBA in addition to acquiring the Graduate Certificate in Financial Planning. Our Graduate Certificate in Financial Planning curriculum is approved by the Certified Financial Planners (CFP) Board. Earning an MBA in Financial Planning from Cleary University, along with a graduate certificate in financial planning, also fulfills the Certified Financial Planners Board's requirements with the additional benefits commensurate with a graduate degree.

The MBA in Financial Planning consists of eleven courses designed to provide students with the analytical abilities, communication skills, and technical competence that will enable them to serve the public in a complex and changing business environment. Overall, this degree prepares candidates for CFP® certification with a balance of personal finance and management skills.

Students complete six courses in financial planning. These courses are also delivered online and are designed to assist students in acquiring the necessary competency to prepare for the CFP exam. Students who successfully complete the seven financial planning course series will receive a Certificate in Financial Planning from Cleary University.

The remaining five courses are taken in other business areas and are offered online. Education in these areas enables financial planning students to understand the concepts, processes, and institutions involved in the production and marketing of goods and services, as well as in the financing of a business and other forms of organizations. The Certificate in Financial Planning and the core comprise the MBA Financial Planning degree.

Qualified MBA students with recent graduate credits may receive up to nine semester credit hours (three classes) of transfer credit from a regionally accredited institution.

### **Program Learning Outcomes**

- Evaluate the risk and insurance needs of a client
- Develop an investment portfolio for a client based on risk return preferences
- Compare and contrast different employee benefits options
- Forecast the retirement needs of a client
- Incorporate effective tax strategies for clients
- Prescribe estate planning strategies for clients
- Construct a financial plan based on the client's needs
- Write and present effectively a financial plan to clients
- Practice financial planning with integrity

**MBA in Financial Planning Course Requirements**

**MBA Core Courses ..... 15 credits**

- ECO 6450 Managerial Economics
- LAW 6050 Law and Ethics
- MAC 6050 Financial Accounting
- MGT 6250 Quantitative Managerial Analysis
- MGT 6360 Management and Organizational Behavior

**Major Courses ..... 18 credits\***

- FNP 6100 Investment Planning
- FNP 6200 Insurance and Risk Management
- FNP 6300 Retirement and Employee Benefits Planning
- FNP 6400 Income Tax Planning
- FNP 6500 Estate Planning
- FNP 6600 Capstone Financial Plan Development Course

**Total..... 33 credits**

\*Note: The Graduate Certificate in Financial Planning earned at Cleary University will satisfy the major requirement for the MBA in Financial Planning. Up to three recent, equivalent courses (or nine credits) may also be transferred from a regionally-accredited institution or from a Certified Financial Planner Board of Standards approved program.