PROGRAM DESCRIPTION:
The Financial Planning certificate provides students with basic accounting skills combined with training in financial planning. Students completing this certificate can assist individuals and companies within the areas of budgeting, taxes, and financial planning. This certificate also serves as an excellent foundation for students wishing to take the National Association of Securities Dealers series 6 and 7 examinations.

HOW DO I KNOW THIS MAJOR IS FOR ME?
- You enjoy meeting new people
- You enjoy inspecting financial records
- You like to record and summarize financial data
- You manage your own financial records
- You like to learn about economics, financial markets and banking
- You are comfortable working with numbers and routine calculating
- You enjoy sharing and teaching information to others
- You like working with data and details

WHAT CAN I DO WITH THIS CERTIFICATE?
- Bill and Account Collection
- Brokerage Clerk
- Credit Checker
- Loan Interviewer
- New Account Clerk
- Financial Sales Agent
- Bank Teller
- Personal Banking Representative

WHERE CAN I WORK?
This pathway provides you with a choice of various work environments including:
- Collection Agencies
- Government Agencies
- Banks or Credit Unions
- Insurance Companies
- Financial Companies
- Investment Firms
- Credit Repair Service
- Credit Reporting Agencies

WHAT IS THE POTENTIAL WAGE OUTLOOK?
This certificate may lead to a position as a Brokerage Clerk, which according to the EDD/LMID Occupational Employment Statistics Survey, 2017 the median wage in California was $44,979 annually or $26.88 per hour. For more information, visit www.labormarketinfo.edd.ca.gov/OccGuides.

The job and wage outlook will vary based on the position selected within this major. To review current salary information and job outlook for other occupational titles, visit www.onetonline.org.

WHAT CAN I DO IN THE FUTURE WITH MORE EDUCATION?
The positions below require at least a bachelor’s degree in Finance. According to O*NetOnline, the median salary in 2016 for Personal Financial Advisors in California was $102,640. You can complete the Business Administration for Transfer Associate Degree at Chaffey to follow this pathway.
- Personal Financial Advisor
- Financial Consultant
- Investment Advisor
- Portfolio Manager
- Financial Manager
- Credit Analyst
- Loan Officer
- Insurance Broker

For additional information about career pathways and to find out if this major is a good fit for you visit the Career Center located in MACC 203. Career information was collected from www.onetonline.org and www.bls.gov.
MAJOR AND COURSE REQUIREMENTS:

LEGEND: G=Grade   IP=In Progress   N=Need   Bold: Prerequisites   Plain Text: No Prerequisites

Requirements for the Financial Planning Certificate: (E116)  
*Non-Transcribed*

<table>
<thead>
<tr>
<th>Course Code</th>
<th>Course Title</th>
<th>Grade</th>
<th>IP</th>
<th>Need</th>
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<tbody>
<tr>
<td>ACCTGFS 440</td>
<td>Introduction to Financial Planning</td>
<td></td>
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<tr>
<td>ACCTGFS 442</td>
<td>Fundamentals of Finance and Investing</td>
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<td>ACCTGFS 453</td>
<td>U.S. and California Income Tax Preparation</td>
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<td>ACCTGFS 465</td>
<td>Financial Accounting for the Non-Accounting Major (or ACCTG 1A, Financial Accounting, 4)</td>
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Plus three units from the following:

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<tr>
<td>ACCTG 460</td>
<td>Commercial Accounting Software</td>
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<tr>
<td>BUS 60</td>
<td>Business Ethics</td>
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</tbody>
</table>

Student Name: ____________________________  
ID#: ______________________________________  
Date: ____________________________  
Counselor: ____________________________

COUNSELOR NOTES:

$46 per unit for CA Residents