



ACADEMIC ADVISING GUIDE

Contents of This Guide:

- Academic Advising Information..... Page 2-4
Student Responsibilities..... Page 4-6
UA Graduation Requirements Page 7-10
o University Foundation Requirements (English, Math, Foreign Language) Page 7
o Placement Information Page 7
o University General Education Requirements Page 8-9
o University Unit and GPA Requirements Page 10
Learning to Use Your PFFP Catalog Checklist Page 10
Understanding Your Advisement Report Page 11-12
PFFP Requirements Page 13-18
o PFFP Major Requirements Page 13
o PFFP Supporting Electives & Internship Advising Page 14
o PFFP Research & Preceptorships Page 15
o PFFP Course Descriptions Page 16-17
o PFFP Prerequisites & Minor Requirements..... Page 18
PFFP Career Opportunities, Transfer Credit, & Study Abroad.....Page 19-20
Registration Tips & Reminders Page 21-23
Important UA Policies Page 24
Important UA Resources Page 25-26



MEET WITH PFFP ADVISING

Tiffany Ortega, Academic Advisor

tortega@email.arizona.edu

McClelland Park, room 203H

PFFP Majors & Minors

To schedule an appointment, visit the PFFP Advising Website:

<https://norton.cals.arizona.edu/academic-advising/personal-family-financial-planning>

Appointments, Drop-Ins, and Email – Determine What is Best for You:

Schedule an Appointment 30 Minute Meeting	Drop-In Advising (5-10-minute quick questions) & 15 Minute Appointments	Email Quick questions/clarifications
<ul style="list-style-type: none"> • Course planning past the current semester (graduation plan) • Minor exploration • Transfer credit approvals • Study Abroad planning • Advising signature for financial aid appeal • Concerns about academic difficulties and advice about academic success strategies • Personal exploration regarding graduate school, internships, jobs, etc. <p>*Make advising appointments online & write down your appointment date and time so you remember to attend.</p>	<ul style="list-style-type: none"> • General information about course offerings or course content • Verification of existing schedule • General information about major requirements or UA policy • Quick Signatures • Degree checks for graduation (15-minute appt. recommended) • Questions like: "Can CHEM 101A fulfill a Natural Scientist requirement?" • Turning in forms for internship, research, or preceptor enrollment (drop-in recommended) • If you have an urgent question that may be longer than a drop-in question, please feel free to drop-in. We will do what we can in the allotted time, and schedule a follow-up meeting if needed <p>*Drop-in advising is on a first-come, first-served basis. There may be a wait, so make sure you have time to stop by.</p>	<ul style="list-style-type: none"> • Clarification if you are unsure an appointment is necessary • Clarification of a UA policy or procedure • Quick review of your current course schedule • Other inquiries – if I can answer your question over email, I will. If your question is more complex, I'll recommend that you make an appointment or attend drop-in advising hours to talk more <p>*Make sure you use your UA email address for advising communication. Allow 24-48 hours for a response.</p>

Make the Most of Academic Advising: Before, During, and After Your Meeting

- Before Advising Meeting**
- Determine what kind of advising appointment you need (meeting vs. drop-in)
 - Familiarize yourself with the UA Calendar and be aware of University deadlines
 - Review your academic advisement report
 - Come prepared with an PFFP catalog checklist
 - Prepare a list of courses you are considering
 - Prepare other questions you have and write them down
 - Bring advising materials from previous appointments
 - Cancel at least 24 hours in advance if you are unable to attend
 - Make your appointment well in advance of your first day to register for classes
 - Bring materials to take notes and a laptop if you have one

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- During Advising Meeting**
- Arrive on time
 - Check-in using the computer at the front of the Student Services office
 - Turn off or silence your cell phone
 - Be open with your advisor on how things are going academically and personally
 - Be willing to share things about yourself so we can better understand your goals and interests
 - Ask question and take notes

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- After Advising Meeting**
- Keep an advising folder with information you learn in all your advising appointments
 - Complete any necessary follow up steps that your advisor recommended
 - Seek available campus resources and opportunities discussed in your appointment
 - If something is unclear afterwards, send follow up questions via email or attend drop-in hours

Email Etiquette

- Use your University of Arizona email account.
- Use a clear subject line such as “Question about my schedule.”
- Include your full name as well as your student ID number.
- Include the course numbers of any classes you are having difficulty registering for, along with any error messages you may be receiving.
- Keep your questions clear, short, and to the point.
- Don’t be too casual with your advisor when using e-mail. Proof-read and spell check!
- Allow 24 hours for a response, excluding weekends and holidays.

ADVISING ROLES & RESPONSIBILITIES

Student Responsibilities

- Read University email daily
- Take the initiative to meet with your advisor at least once per semester, or as often as needed, to discuss your progress
- Be involved in the advising process by being prepared to discuss your goals and educational plans during meetings, bring questions and necessary materials to meeting, and be open to suggestions
- Take responsibility for making academic and career decisions based on available information and advice
- Develop a working knowledge of policies, procedures, deadlines, and campus resources
- Execute an academic plan directed toward completing your degree
- Review and become familiar with your major/minor requirements each semester and track your progress towards graduation
- Utilize UA resources that will help you succeed academically and prepare for life after graduation

Advisor Responsibilities

- Provide accurate and consistent information
- Clarify, interpret, and confirm program requirements, policies, procedures, and deadlines
- Advise students in exploring and defining academic and career goals
- Assist students with creating short and long-term academic plans
- Assist students with making academic and career decisions consistent with interests, values, and abilities
- Listen responsively to address questions, concerns, and problems
- Facilitate relationships between students and other individuals on campus; refer students to appropriate support services when needed
- Maintain confidentiality according to the Family Educational Rights and Privacy Act (FERPA)
- Consider student's best interest when advocating for policy or curricular changes
- Be available and accessible to answer questions

GET TO KNOW YOUR ADVISORS

As a PFFP student in the College of Agriculture and Life Sciences (CALs), you have two sets of advisors - PFFP Major Advisors and a College Advisor. Below is a description of each advisor's role

PFFP Major Advisors – McClelland Park Room 203:

Major coursework advising

- Course selection and sequencing, meeting PFFP graduation requirements
- Evaluation of transfer credit in the major

Getting involved on campus

- Finding clubs, internships, and research opportunities
- Connecting with PFFP faculty and internship coordinator
- Tiffany Ortega – PFFP Academic Advisor
tortega@email.arizona.edu

CALS Advisors – Forbes Room 203:

Process forms and petitions, acts as Dean's signature

- General education petition
- Withdrawals past week 10
- Academic eligibility advising for students below 2.0 GPA

Policy interpretation and enforcement

<https://cals.arizona.edu/students/advising>

STUDENT RESPONSIBILITIES

Student Four Year Timeline: Your advisors are here to help you with all these steps. Every semester it is recommended that you meet with your advisor at least once (or as much as needed), and that you always ensure that your wellbeing comes first, by reaching out for personal or academic assistance when necessary.

1st Year

- Explore interests, strengths, and careers
- Make tentative plan of classes year by year
- Get involved with clubs, organizations, and volunteering
- Start looking into internships, research, and/or study abroad
- Start building a resume
- Start to develop effective time management and study strategies
- Attend office hours
- Explore campus resources that can enhance your academic and personal success

2nd Year

- Finalize and declare major(s) and minor(s)
- Seek volunteer opportunities, internships, research, and/or study abroad programs
- Update resume
- Develop relationships with faculty and attend office hours
- Research post-graduation options and talk with mentors about your goals
- Stay involved in activities that suit interests and goals

3rd year

- Research career options and graduate programs
- Talk to advisors, internship coordinators, and career services to enhance professional skills
- Update resume
- Continue volunteer opportunities, internships, research, and club involvement
- Take graduate entrance exams
- Continue connecting with faculty and mentors

4th Year

- Apply for graduation and meet with your advisor to complete your degree check
- Finalize career, professional, or graduate school plans
- Apply for graduate or professional schools
- Submit resumes and begin interviewing

Student Semester Timeline: Your advisors are here to help you with all these steps

Term Begins: Identify semester goals and finalize semester schedule

Week 1: If necessary, make any last-minute changes to your schedule
Check academic deadlines on the Registrar's website regarding adding and dropping courses for the semester

Week 2: Evaluate how you are doing in your classes. Make a time management plan for the semester.
The deadline to drop a course without a W occurs the 2nd week of classes

Weeks 3-8: Visit your instructors during their office hours before your first exams and papers. Start looking into clubs, volunteer opportunities, and campus resources to support your success.
During weeks 3 through 10, you can drop a course through UAccess but will receive a W on your transcript (you can receive a maximum of 18 units of W at the UA)

Week 7-8: Get ready to register for next term and make an appointment with your academic advisor

Week 8-10: Re-evaluate how you are doing in your current courses. Attend office hours and seek academic assistance when necessary.
The final withdrawal deadline will occur week 10

Weeks 11-13: *During weeks 11-13, students can drop a course with a W only through a Late Change Petition, which must be filed through the College Dean's Office (Forbes 203) and signed by your instructor*

Week 13 - Finals Week: Complete any projects due at the end of the term. Verify final exam schedule and start to review. Visit office hours and Think Tank for extra help.
Complete withdrawal from all classes is available until the last day of classes

*If you are enrolled in a dynamically dated class (5 weeks, 7 weeks, etc.) make sure you look at the Dates and Deadlines for those classes to understand add/drop deadlines, as they will be different from 15 week courses
<https://www.registrar.arizona.edu/courses/dates-deadlines>

GRADUATION REQUIREMENTS

University Foundation Requirements

English

Choose one of the following sequences based on placement

- ENGL 101 & 102
- ENGL 107 & 108
- ENGL 109H
(requires placement)

Math

PFFP requires Calculus

- Math 113, Math 116, or Higher Math

Students must test into Calculus or complete the necessary math sequence based on placement. For example:

- Math 100 → Math 107 or Math 112 → Math 116
*Math 107 does not serve as a prerequisite to other math and science courses. Consult with your advisor if you have questions about the math course best for you

It is highly recommended that students complete Calculus before their junior year. Meet with your advisor to plan correctly!

Foreign Language

PFFP requires 2nd semester language proficiency

There are 3 Ways to demonstrate proficiency:

- Complete a 2nd semester language course with a C or better (e.g., SPAN 102, FREN 102)
- Score the equivalent of 2nd semester skill level on a language proficiency exam administered by UA
- AP, IB, or CLEP exam scores

Placement Information

- Writing Placement: <https://english.arizona.edu/foundations-writing>
- Math Placement: <http://math.arizona.edu/academics/placement>
- Language Proficiency Requirements and Exam: <http://advising.humanities.arizona.edu/second-language-proficiency-requirements>
- Testing Office, for Math Placement Test and CLEP Exam: <http://testing.arizona.edu/>

Math & Language Substitution Information

PFFP does allow math & foreign language substitutions for students who have a documented learning disability, which may affect learning and comprehension in math or language courses. If you have this documentation and believe a substitution may apply to you, please make an appointment to speak with your academic advisor and the Disability Resource Center. We can talk about the process of receiving a substitution, and talk about the other types of courses available to fulfill your requirements.

General Education Tiers Requirements

(For students who started at UA before Spring 2022)

Tier I	Tier II	Diversity
<p>Individuals and Societies (INDV) Choose 2 courses numbered 150, for example: HIST 150C1 and ANTH 150B1</p>	<p>ARTS</p>	<p>Diversity Emphasis Course: Focus is on Gender, Race, Class, Ethnicity, Sexual Orientation, or Non-Western Studies. <i>Can be fulfilled through approved Tier I or Tier II Gen Eds</i></p>
<p>Traditions and Cultures (TRAD) Choose 2 courses numbered 160, for example: CLAS 160D1 and SPAN 160C1</p>	<p>Humanities</p>	<p>Notes: Courses used to fulfill Tier I or Tier II General Education requirements cannot be used to fulfill PFFP major requirements. A maximum of two Tier Two courses may also be used to satisfy minor requirements.</p>
<p>Natural Sciences (NATS) Choose 2 courses numbered 170, for example: GEOS 170A1 and PTYS 170B2</p>	<p>Natural Sciences</p>	
<p>PFFP does not require students to complete a Tier II INDV Gen Ed</p>		

New General Education Requirements

(For students who started at UA Spring 2022 or later)

Introduction to the Gen Ed Experience: 1 Unit Course

UNIV 101 (1 unit)

Helps students understand, reflect on, and articulate the purpose and value of their GE courses. Students who are classified as first-year students at the point of admission are required to take UNIV 101; other new students (including transfer and readmitted students) have the option of taking UNIV 101.

Exploring Perspectives (EP): 4 Courses

students explore and practice the approaches and ways of reasoning of the Artist, Humanist, Natural Scientist, and Social Scientist.

EP: Artist

(1 course, 3 units)

EP: Humanist

(1 course, 3 units)

EP: Natural Scientist

(1 course, 3 units)

EP: Social Scientist

(1 course, 3 units)

Building Connections (BC): 3 Courses

students explore the unique contributions of knowledge, skills, methodologies, values and perspectives from varied disciplines, social positions, and perspectives.

BC: Course #1

(1 course, 3 units)

BC: Course #2

(1 course, 3 units)

BC: Course #3

(1 course, 3 units)

General Education Portfolio: 1 Unit Course

UNIV 301 (1 unit)

Helps students reflect upon and make meaning of their GE experience through their ePortfolio. Students who are classified as first-year students at the point of admission are required to take UNIV 301; other new students (including transfer and readmitted students) have the option of taking UNIV 301;

Notes:

*A maximum of 9 units of general education coursework may double count to fulfill requirements in a major or minor. Consult with academic advisor to discuss how this applies to your academic plan.

Unit & GPA Requirements

- 120 Overall Units
- 42 Upper Division Units (300-499 level)
- 56 Units must be University Level (Not taken at a community college)
- 30 Units in Residence (In residence means taken at UA)
- 18 of 30 units in Residence must be upper division (300-499 level)
- 2.0 Cumulative GPA and 2.0 Major GPA is required to graduate
 - If a student's GPA falls below a 2.0 at any point in their undergraduate education, they are placed on academic warning or academic probation, and are required to meet with academic advisors.

LEARNING TO USE YOUR PFFP CATALOG CHECKLIST

Access your PFFP Catalog Checklist

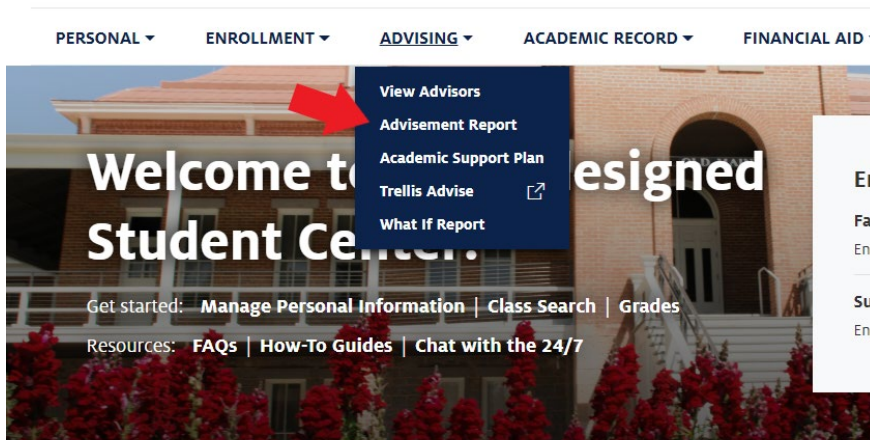
You can download your checklist from this link: <https://norton.arizona.edu/pffp-catalog-checklists>

Use the checklist for your specific catalog year or requirement term.

- Some requirements are different based on your catalog year, so it is important that you follow the requirements for your individual requirement term, and become familiar with those requirements
 - Your catalog year is typically the year you started at the UA (although you can elect to follow later catalog years if requirements change, and if that change benefits you).
 - For example, if a student is currently following the 2018 catalog requirements because they started at UA in 2018, they can choose to update their catalog year to 2020 if requirements have changed and if that change benefits them.
 - Students cannot go backward in catalog year. If you start at UA in 2020 you cannot follow a catalog year from 2019, 2018, etc.
 - Your catalog year or requirement term can be found on the first page of your advisement report (see image below, on page #9).
 - Your catalog year is important, since it tells you which PFFP checklist to use and what requirements you will follow for your graduation planning.
- **Update your checklist each semester**
 - Remember that your checklist is a planning tool and it should be used in consultation with your UAccess Advisement Report and your Academic Advisor
 - Bring a completed checklist to appointments to go over questions with your advisor

UNDERSTANDING YOUR ADVISEMENT REPORT

Access Your Advisement Report through your UAccess Student Center:



Your Advisement Report is the official record of your progress toward graduation. It follows the same general sequence as your PFFP catalog checklist. We recommend you utilize your advisement report to help you complete your PFFP checklist, and stay on track to graduation.

It's recommended that you view your advisement report as a PDF document

Your Advisement Report tells you important information:

- Your requirement term or catalog year
- Your GPA (overall GPA, major GPA, and minor GPA)
- Units Required, Completed & in Progress

Note: Units listed in the total units (middle column) includes all units completed *and* currently in progress at UA.

Graduation Requirements

Academic level	Required GPA	Actual GPA	GPA Status	Requirement Term
Undergraduate Career	2.000	3.776	Satisfied	Fall 2018
Personal & Family Fin Planning Major (BS)	2.000	3.286	Satisfied	Fall 2018
Spanish Minor	2.000	3.500	Satisfied	Fall 2018
Unit Requirements	Required Units	Total Units *	In Progress Units	Unit Status
Units Required for this Degree	120.00	136.00	3.000	Satisfied
Upper Division Units	42.00	60.00	3.000	Satisfied
Units in Residence	30.00	119.00	3.000	Satisfied

PFFP MAJOR REQUIREMENTS

UA Foundation & General Education

COMPOSITION (Select ONE Sequence)

ENGL 101 & 102 _____ & _____
 OR ENGL 107 & 108 _____ & _____
 OR ENGL 109H _____

MATH

MATH 112: College Algebra _____
 MATH 116 or MATH 113: Calculus Concepts _____

FOREIGN LANGUAGE: You must demonstrate 2nd semester level proficiency in a foreign language _____
 Total Units: _____

GENERAL EDUCATION

UNIV 101: Intro to General Education (1 unit) _____

Exploring Perspectives (1 course in each area)

Artist: _____
 Humanist: _____
 Natural Scientist: _____
 Social Scientist: _____

Building Connections (3 courses)

1) _____
 2) _____
 3) _____

General Education Capstone (1 unit) _____
 Total Units: _____

PFFP Prerequisites

BE 120 or MIS 111: Computing applications _____
 ACCT 200: Intro to Financial Accounting _____
 ECON 200: Basic Economic Issues _____
 PFFP 216A: MS Excel & Retail Business Analysis (1 unit) _____
 HECL 201 or PSY 230 _____
 BNAD 276 or SOC 375: Statistics _____
 HECL 202 or PSY 290A or SOC 374: Research Methods _____
 ACCT 210: Intro to Managerial Accounting _____
 Total Units: _____

PFFP Upper Division

PFFP 310: Fundamentals of PFFP _____
 PFFP 311: Applied Family Investment Planning and Savings Strategies _____
 PFFP 314: Personal and Family Risk Management _____
 PFFP 315: Applied Personal and Family Income Tax Planning (Fall course only) _____
 PFFP 402: Personal and Family Estate Planning _____
 PFFP 403: Retirement Savings and Family Income Strategies _____
 PFFP 406: Professional Conduct and Fiduciary Responsibility _____
 PFFP 498: Capstone _____
 PFFP 493: Internship (6 units) _____

Total Units: _____

Additional Required Coursework

HECL 301: Applying Critical Thinking _____
 OR ENGL 307* Business Writing _____
 PFFP 370: Legal and Ethical Issues in Retailing _____
 RCSC 346: Fundamentals of Marketing _____
 PFFP 476: Retail Finance Services _____
 Total Units _____

Supporting Electives

Choose 4 Courses (12 units) from the following:
 HECL 302: Family and Consumer Personal Finance
 HDFS 413: Issues in Aging
 HDFS 401: Basic Skills in Counseling
 HDFS 405: Theories of Counseling
 HDFS 427A: Mental Health & the Family
 OR: other 300/400-level course in AREC, HECL, HDFS, or RCSC (dependent on prerequisites)

1. _____ 3. _____
 2. _____ 4. _____

Total Units _____

What are Supporting Elective Courses?

Supporting Electives are classes that provide PFFP majors with some knowledge about working with people, understanding different populations and the issues they face, effective communication, counseling, and educating. PFFP majors are required to take four supporting electives, so that they may balance their knowledge of finance with the understanding and skills needed to work effectively with people.

Supporting Electives need to be upper-division (300 or 400-level) classes. Here are some options.

- HECL 302: Family and Consumer Personal Finance
- HDFS 413: Issues in Aging
- HDFS 401: Basic Skills in Counseling
- HDFS 405: Theories of Counseling
- HDFS 427A: Mental Health & the Family
- OR: other 300/400-level course in AREC, HECL, HDFS, or RCSC
- (dependent on prerequisites)

Reminder About Upper Division Units: 42 Upper Division Units (300-400 level) are required to graduate. PFFP students need to be aware of this requirement and ensure they are meeting it.

Internship

PFFP 493 - Internship

A 6-unit (270-hour) internship is required for each PFFP major. This is supervised, experiential, and professional work related to PFFP. This experience gives students the opportunity to practice classroom learning in a real-world setting. It also provides the opportunity to gain experience working in financial a financial planning firm.

- The **Internship Course** is offered in the Fall, Spring, and Summer.
- Internships can be completed in or outside of Tucson, students must be PFFP Majors to enroll, and we recommend that students have completed at least four of the PFFP upper-division courses before enrolling
- 2.25 GPA (Major and Cumulative GPA) is recommended
- To complete 6 units of internship, students must work 270 total hours at their site. They are also enrolled in a D2L course that they complete during their internship experience.

PFFP Internship Advising

Connect with Cassandra Ott-Kocon for PFFP internship advising – caott@arizona.edu

Cassandra can help all PFFP students as they explore internship opportunities and as they begin to complete their steps for enrolling in internship credit. All students interested in enrolling in internship units must complete an internship workplan with their worksite. Once completed, this workplan should be submitted to Cassandra so she can approve your internship and enroll you in you in the course.

<https://norton.arizona.edu/pffp/internships>

PFFP 492 - Directed Research

Supervised work alongside a faculty member, participating in academic research related to PFFP. These experiences are great for those students interested in graduate school, or those interested in developing their research skills

- 2.25 GPA (Major and Cumulative GPA) is recommended
- Look at research opportunities online and contact faculty members you are interested in working with. Browse faculty research at <https://norton.arizona.edu/people/personal-family-financial-planning-directory>
- Once you find a research opportunity, complete the independent study form, and turn your application in to Student Services (McClelland Park room 203) or to your advisor via email in order to get enrolled. Talk with your faculty member about the course best for you:
 - Research – PFFP 492 (letter graded, does count toward GPA)
 - Independent Study – PFFP 499 (Pass/Fail, does not count toward GPA)
 - Honors Thesis – PFFP 498H (letter graded, does count toward GPA)

PFFP 491 - Preceptorship

Supervised teaching experience alongside an PFFP faculty member. Preceptors are part of a teaching team and help facilitate learning in PFFP classes they have previously and successfully completed

- GPA requirements are up to the instructor you are working with
- Talk with instructors you are interested in preceptoring for
- Once you find a preceptor opportunity, complete the preceptor application and turn your application into Student Services (McClelland Park room 203) or to your advisor via email in order to get enrolled

Information and Applications Can be Found Online:

<https://norton.arizona.edu/academic-advising/personal-family-financial-planning>

Internships & Practicum: <https://norton.arizona.edu/pffp/internships>

Research & Independent Study: <https://norton.arizona.edu/pffp/forms-applications>

Preceptor Form: <https://norton.arizona.edu/pffp/forms-applications>

Turn completed applications in to McClelland Park room 203, or to your advisor via email, and advisors will enroll you in your units

PFFP Student Program Fee

When students reach junior status (60 or more units completed), students in the PFFP major will be charged a \$250 per semester student fee. This student fee supports:

- Professional development workshops and events
- Professional development courses like PFFP internship courses
- Academic advising and internship coordination that students have access to as they reach junior status in the PFFP program

CALS Career Center

Connect with the **CALS Career Center** for additional assistance with resume building, career exploration, internship exploration, interview preparation, and graduate school preparation. They also host a lot of great workshops and events for career preparation and professional development!

<https://career.cals.arizona.edu/>

Student Engagement and Career Development

Connect with **Student Engagement and Career Development** for workshops, resume reviews, career fairs, and Life Lab for major and career exploration. <https://www.career.arizona.edu/>

PFFP Course Descriptions

PFFP 310: Fundamentals of Personal and Family Financial Planning - This course is designed to introduce students to a broad overview of personal and family financial planning, with specific emphasis on the financial planning process, financial strategies, savings and cash flow management, insurance, investments, taxes, use of credit, and time value of money.

PFFP 311 - 001 Applied Family Investment Planning and Savings Strategies - This course is designed to familiarize students with the understanding and evaluation of investment options, plus the risks and rates of return of each type of investment. It will also incorporate, among other topics, cash flow management, time value of money, measurement of investment returns, investment strategies, asset allocation and portfolio diversification, and alternative investments.

PFFP 314: Risk Management and Insurance Planning - This course is designed to provide students with an introduction to the techniques and issues of risk management and insurance. While businesses will be included in the discussion, the emphasis of the course will be on personal risk management and insurance. Topics to be examined include life, disability, and health risks, social insurance, real and personal property liability risk, insurance companies and product markets, insurance pricing, insurance taxation, government regulation of insurance, legal principles in risk management and insurance, types of insurance contracts and the contents thereof, and professional ethics and market conduct.

PFFP 315: Applied Personal and Family Income Tax Planning – This course is designed to introduce students to federal income taxation and the role of the tax code in financial planning for individuals, businesses, and business owners. Topics addressed include fundamentals of income tax planning, the measurement of taxable income, the taxation of business income, individual income taxation, and the tax compliance process.

PFFP 402: Personal and Family Estate Planning - This course is designed to familiarize students with the principles and fundamentals of the estate planning process for individuals and families, as well as the various strategies and techniques available for generating a constructive estate plan. Course topics will include: gift, estate and generation-skipping transfer taxes coupled with planning techniques to minimize taxes on wealth transfers; strategies to transfer property, real and personal; non-tax

characteristics of estate planning, including, probate, estate administration, and property ownership; and estate planning documentation.

PFFP 403: Retirement Savings and Income Planning - This course is designed to provide students with the knowledge of both public and private retirement plans, with an appreciation of the usefulness of employee benefits and the ability to counsel others on important retirement and employee benefit decisions. Discussion will include corporate pension and profit-sharing plans, self-employed Keogh plans, IRAs, annuities, health insurance, and social security, as well as additional issues individuals face in retirement, including insurance, medical, and life-style and community choices.

PFFP 406: Professional Conduct and Fiduciary Responsibility - This course is designed to introduce students to an overview of the ethical, legal, and fiduciary environment in financial planning and wealth management. It is based on the assumption that financial planning, like business and law, is a profession whose practitioners carry out an important role, not only in the financial planning industry, but also in society in general. As individuals enter the profession, they take on a distinctive set of responsibilities that go with the role. The purpose of the course is to provide students a pragmatic understanding of professional conduct, ethics, and fiduciary responsibility, and to provide students an array of functional tools to meet the expected standards of the industry.

PFFP 493: Internship - Specialized work on an individual basis, consisting of training and practice in actual service in a technical, business, or government establishment (financial planning firm).

PFFP 498: Capstone: Family and Personal Family Plan Development - This capstone course bridges academic coursework with actual practice management, introducing students to the skills and tools needed for developing a comprehensive financial plan for a client. The first part of the course provides a review of the financial planning CFP Board topics, including ethics and principles of communication and counseling. Classes also review/apply the process and techniques for preparing and presenting a financial plan in an environment of non-liability.

PFFP Prerequisite Guide & Typical Course Offerings

PFFP COURSE INFORMATION

Follow all Required/Recommended Prerequisites listed below before enrolling

PFFP 310	Fundamentals of Personal and Family Financial Planning	Offered: Fall, Spring Prerequisites: ECON 200, ACCT 200
PFFP 311	Applied Family Investment Planning and Savings Strategies	Offered: Fall, Spring, & Summer Prerequisites: ECON 200, ACCT 200, ACCT 210
PFFP 314	Risk Management and Insurance Planning	Offered: Fall, Spring Prerequisites: ECON 200, ACCT 200
PFFP 315	Applied Personal and Family Income Tax Planning	Offered: Fall, Spring Prerequisites: ECON 200, ACCT 200
PFFP 402	Personal and Family Estate Planning	Offered: Fall, Spring Prerequisites: ECON 200, ACCT 200
PFFP 403	Retirement Savings and Income Planning	Offered: Fall, Spring Prerequisites: ECON 200, ACCT 200, ACCT 210
PFFP 406	Professional Conduct and Fiduciary Responsibility	Offered: Fall Prerequisites: ECON 200, ACCT 200
PFFP 493	Internship	Offered: Fall, Spring, & Summer Recommended: Taking at least 4 PFFP classes prior to internship
PFFP 498	Capstone: Family and Personal Family Plan Development	Offered: Fall, Spring, Summer Prerequisites: PFFP 310, 311, 314, 315, 402, & 403

Find Research, Independent Study, and Preceptor Applications Here: <https://norton.arizona.edu/pffp/forms-applications>

Minor Requirements

A minor is optional for PFFP majors

- Most Minors are at least 18 units, and 9 units must be upper division
- Students are encouraged to choose a minor in an area related to their career goals
- You may choose any minor on campus, or take courses toward a thematic minor
 - Minor Advising Directory: <http://advising.arizona.edu/advisors/minor>
- A thematic minor allows students to create and structure their own minor in consultation with a PFFP advisor
 - Thematic minors encourage students to take a variety of courses that will prepare them for future goals and careers
 - For more information about Thematic Minors visit our website: <https://norton.cals.arizona.edu/HDFS/thematicminor>

PFFP CAREER OPPORTUNITIES

This PFFP program is approved by the Certified Financial Board of Standards and will prepare students to take the CFP Certification Exam.

The PFFP major leads to a variety of rewarding careers & graduate school opportunities. Here are just a few of the possibilities:

- Financial Planner
- Estate Planner
- Retirement Planner
- Wealth Manager
- Client Services Specialist
- Financial Services Consultant

Advanced Degree Paths

PFFP graduates may deepen their understanding and expand their career options through graduate business school or law school to prepare for these additional careers.

- Investment Manager
- Portfolio Analyst
- Bank Trust Officer

TRANSFER CREDIT

<https://transfercredit.arizona.edu/>

For all transfer coursework, before taking the course you should verify that credits will transfer to UA and fulfill necessary requirements.

For courses taken at Arizona Community Colleges:

- Use the aztransfer.com Course Equivalency Guide to make sure that you take correct courses at your local AZ community college: <http://aztransmac2.asu.edu/cgi-bin/WebObjects/CEG>
- For a list of common course equivalencies at Pima, Arizona Western, and Rio Salado for PFFP requirements, see Transfer Course Equivalency List on our website: <https://norton.arizona.edu/pffp-catalog-checklists>

If You Plan to Take Courses Outside of Arizona:

- View the UA Transfer Credit Guide to see if the out of state courses at the institution you will attend have already been evaluated: http://aztransfer.com/UACEG/UA_CEG_OutOfState.html

Transfer Credit Approvals:

- For approval of other courses not listed on the UA Transfer Credit Guide or on the AZTransfer.com Course Equivalency Guide, submit a Course Equivalency or Credit Request here: <https://transfercredit.arizona.edu/content/credit-evaluation>
- Math courses need specific approval from the Math department: <http://math.arizona.edu/academics/placement/credits>

Transfer Credit Reminders:

- C or better needed in all transfer work
- You cannot GRO classes taken elsewhere
- Once coursework is complete, you need to send official transcripts to the UA: <http://registrar.arizona.edu/academics/sending-college-level-transcripts-ua?audience=students&cat1=7&cat2=28>

Studying Abroad

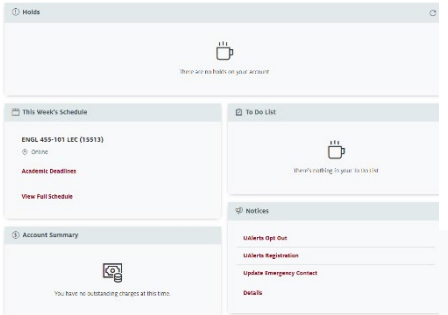
<https://global.arizona.edu/study-abroad>

If you plan to study abroad, see your advisor early to talk about planning for your semester away. Many PFFP students study abroad, and graduating in four years while also studying abroad is feasible with the right planning:

- Saving some general education & minor coursework is often the best, although if you study at an institution abroad that has a PFFP Program, you may be able to earn credit toward your major
- Consider when you want to go, and consider the classes you would take while away
- See your major advisor to talk more about your study abroad goals and course options!

The PFFP program has Global Tracks in Aix-en-Provence, Barcelona, Rome, and Seoul. Specific courses for this program can be found here <https://international.arizona.edu/study-abroad/global-tracks>

REGISTRATION TIPS AND REMINDERS



Spring 2021

Shopping carts will be available on Oct 1 for students who are eligible to enroll for this term.

Fall 2020

Enrollment Open: **Enroll Now**

Summer 2020

Enrollment Open: **Enroll Now**

Check notices and holds - past due balance, academic warning/advising holds, etc. may restrict you from registering!

Every student is given an enrollment date, which is assigned in UAccess. Your registration appointment will begin at 6AM on the date assigned, and remain open until the start of the next semester.

Starting in October and March each semester, you can view your enrollment date on your UAccess student page.

This will tell you when you can start adding courses to your shopping cart and when you can begin enrolling in courses.

Remember that your enrollment date is based on your class standing, which is based on units completed as of the beginning of this semester, not how many years you've been a student.

- Fewer than 30 units = freshmen registration
- 30 or more units = sophomore registration
- 60 or more units = junior registration
- 90 or more units = senior registration

[Registration tutorials](#) & [Registration dates](#) are also listed on the Registrar's Website

Common Enrollment Error Messages:


If you get an error message when enrolling in a course, take a minute to think about why:

- Do you meet the enrollment requirements and prerequisites listed for the course on UAccess?
 - When searching for courses, always click on the course and look at the "enrollment requirements" listed
 - You can also use the "check availability" feature in your UAccess shopping cart in order to determine your ability to enroll in a course
 - During the beginning of your enrollment period, some courses may only be available to students declared in certain majors. Once all students (Seniors through Freshmen) have had their enrollment period, departments will often open courses that may have been restricted to you earlier (like PSY and SOC courses). This means that you can keep courses in your shopping cart, and try enrolling later, once some courses become available to you.
- Are you trying to enroll in a course that requires department consent?
 - Courses like internship, preceptorship, research, or independent study require you to submit an application before getting permission to enroll in these courses. You cannot enroll yourself in these courses.
- Are you trying to enroll in a course that is restricted only to Honors students?
- Are you trying to enroll in a course through one of UA's distance or online campuses? Main campus students only have ability to enroll in main campus courses.
- Trying to enroll in more than 19 units?
 - You need permission to enroll in more than 19 units, and can get that permission by talking with your major academic advisor

Examples: Checking Enrollment Requirements

When Registering for PFFP Courses, make sure you look at **location (Main Campus)**
 Courses offered through the Yuma Campus are not available to UA Main Campus students

FSHD 401 - 001 Basic Skills in Counseling

 Distance

 Yuma

 8/24/2020 - 12/9/2020

Selected counseling skills and their applications. Designed for students needing basic skills in counseling as an adjunct to other primary occupational functions. Approved as: Interdisciplinary course in FSHD major--Advanced Complementary perspectives.

Status

Open

Class Number

66899

Session

Regular Academic Session

Units

3 units

Instruction Mode

In Person

Class Components

Lecture Required

Career

Undergraduate

Grading

Regular Grades A, B, C, D, E

For all courses, make sure you look at **enrollment requirements** to determine your eligibility to enroll

Open w/Req

30881

Regular Academic Session

Units

3 units

Instruction Mode

In Person

Class Components

Lecture Required

Career

Undergraduate

Grading

Regular Grades A, B, C, D, E

Class Notes

**Course Requisites: FSHD 257 OR SOC 321 OR equivalent course

Meeting Information

Days & Times	Room	Instructor	Meeting Dates
TuTh 3:30PM - 4:45PM	McClelland Park, Rm 103	Melissa Curran	08/24/2020 - 12/09/2020

Enrollment Information

Enrollment Requirements

Statistics (FCSC 201 OR PSY 230 OR SOC 375 OR SBS 200 OR MATH 163 OR MATH 263 OR ISTA 116) AND Reseach Methods (FCSC 202 OR PSY 290A OR SOC 374 OR AFAS 302).

Class Attributes

Writing Emphasis Course

Per Unit Fee

\$0.00

Flat Fee

\$0.00

iCourse Fee

\$0.00

Term	Session	
Fall 2020	Seven Week - First	
Subject	Course Number	Course Keyword
PSY - Psychology Main	230	
Campus	Location	
University of Arizona - Main		
<input type="checkbox"/> Show Open Classes Only		

Advanced Filters ▾

Filter by Class Attribute

Course Attribute	Course Attribute Value
General Education	Gen Ed: Tier 1 Traditions and Cultures/160
Class Attribute 2	Class Attribute Value 2
General Education	Gen Ed: Diversity Emphasis

General Filters

Class Nbr	Course Component	Instructor Last Name
Mode of Instruction	Interdisciplinary Interest Area	Course Career
Fully Online		

Filter by Units

Make sure you are searching in the correct **term**

Looking for a full 15 week course, or a 7 week course? Use the **session** dropdown menu to filter (7 week sessions are available for many GE courses each semester)

Looking for a specific class in a certain subject area? Use the **subject search area**, and type in the **course number**

If you want to see all classes offered, even classes that are currently full, uncheck the **“show open classes only box”**

Use **Course Attribute** and **Course Attribute Value** Fields to search for general education classes.

For Students who started at UA before Spring 2022, select “Gen Ed Tiers (Before 2022)”

For Students who started at UA Spring 2022 or later, select “Gen Ed (Begins 2022)”

Looking for an **online class**? You can search for fully online courses by using the “mode of instruction”

IMPORTANT POLICY INFORMATION

Get to know the Catalog: <http://catalog.arizona.edu/>

Get to know the Registrar's Website: <http://www.registrar.arizona.edu/>

Dates & Deadlines

- Make sure you understand important deadlines each semester, like last day to add courses, last day to drop without a W, last day to drop on your own through UAccess, last day to file for GRO, and last day to receive a refund. Bookmark this page and refer to it every semester <https://www.registrar.arizona.edu/dates-and-deadlines>

Grade Replacement Opportunity (GRO)

- You can replace up to 3 courses or 10 units with a new grade. You are only eligible before you reach 60 units earned at UA <http://registrar.arizona.edu/academics/grade-replacement-opportunity-gro>

Withdrawing from Courses

- Understand Withdrawal Deadlines and Withdrawal Options
- You can receive a W in a maximum of 18 units (6 classes)
- Medical / Retroactive Withdrawal is possible for students with medical or personal circumstances affecting completion of coursework
- Always talk with advisors about these policies and the options best suited for you

Back 2 UA

- You can leave the UA for two semesters, if you are in good academic standing, and return without having to reapply to the university <https://admissions.arizona.edu/how-to-apply/returning-students/back2ua>
- If you have a scholarship, check with the Scholarship Office about taking time away from UA

Financial Aid & Bursar's Office

- Understand your financial aid and ask questions
- Review information about summer financial aid: <https://financialaid.arizona.edu/types-of-aid/summer>
- For tuition and fees visit the bursar's office: <http://bursar.arizona.edu/students/fees>

Academic Eligibility

- A 2.0 GPA is required to be in good academic standing. Students below a 2.0 are on academic warning or probation, and are required to meet with advisors to go over academic plans. <https://catalog.arizona.edu/policy/undergraduate-academic-eligibility-policy>

Have a scholarship?

- Make sure you understand how many units you need to take each year at UA: (most require 30 units per academic year at the University of Arizona) <https://financialaid.arizona.edu/types-of-aid/scholarships>

CAMPUS RESOURCES

University Services & Resources

Registrar: <http://registrar.arizona.edu/>

Academic Dates, Deadlines, and Enrollment Information:

<https://www.registrar.arizona.edu/dates-and-deadlines>

Academic Catalog: <http://catalog.arizona.edu/>

Bursar's Office: <http://bursar.arizona.edu/>

Tuition & Fees Calculator:

<https://tuitioncalculator.fso.arizona.edu/#/>

Scholarships & Financial Aid:

<https://financialaid.arizona.edu/>

Student Support Resources

CALS Learning Lab: <https://cals.arizona.edu/learning-lab>

Think Tank: thinktank.arizona.edu

Writing Skills Improvement Program:

<http://wsip.arizona.edu/>

THRIVE Center: <https://thrive.arizona.edu/>

Student Engagement & Career Development:

<http://career.arizona.edu/>

CALS Career Center:

<http://cals.arizona.edu/students/cals-career-center>

Campus Recreation: <https://rec.arizona.edu/>

Disability Resource Center: <http://drc.arizona.edu/>

CALS Scholarships:

<https://cals.arizona.edu/students/scholarships>

Scholarship Universe:

<https://financialaid.arizona.edu/scholarshipuniverse>

UA Phonebook:

<http://directory.arizona.edu/phonebook>

UA Libraries: <http://new.library.arizona.edu/>

UITS (technology services):

<http://uits.arizona.edu/>

Dean of Students:

<https://deanofstudents.arizona.edu/>

Campus Resources:

<https://deanofstudents.arizona.edu/support/campus-resources>

Campus Health:

<https://www.health.arizona.edu/>

CAPS (Counseling Services):

<https://health.arizona.edu/counseling-psych-services>

CALS Life Management Counseling:

<https://cals.arizona.edu/life-management-services>

Wildcats RISE

<https://caps.arizona.edu/rise>

Advising Services

Advising Resource Center: <https://advising.arizona.edu>

Advising Directory:
<https://advising.arizona.edu/content/academic-advisor-directory>

GPA Calculators:
<https://advising.arizona.edu/content/online-tools/grade-calculators>

PFFP Academic Advising
<https://norton.arizona.edu/academic-advising/personal-family-financial-planning>

PFFP Internship Advising
<https://norton.arizona.edu/pffp/internships>

CALS Academic Advising
<https://cals.arizona.edu/students/advising>

Arizona Transfer Guide: <https://www.aztransfer.com/>

Student Involvement

ASUA: <https://asuatoday.arizona.edu/>

Student Centers:
<https://diversity.arizona.edu/student-centers>

UA Leadership Programs:
<http://leadership.arizona.edu/>

Study Abroad:
<https://global.arizona.edu/study-abroad>

CALS Clubs & Leadership Programs:
<https://cals.arizona.edu/students/campus-life>

HDFS Ambassadors:
<https://norton.cals.arizona.edu/HDFS-ambassadors>

Transfer Credit Office:
<https://transfercredit.arizona.edu/>

Pre-Health Advising:
<http://clas.arizona.edu/prehealth/advising-resources>

Pre-Law Advising:
<https://theacenter.arizona.edu/pre-law/pre-law-advising>

Math Placement Testing:
<https://www.math.arizona.edu/academics/placement/exams>

Language Placement & Proficiency Testing:
<https://advising.humanities.arizona.edu/language-placement-and-proficiency-exams-faqs>

Take Charge CATS
[Below is Take Charge Cat's Instagram feed | Take Charge Cats \(arizona.edu\)](#)

Immigrant Student Resource Center:
<https://immigrant.arizona.edu/>

Transfer Center:
<https://transfercenter.arizona.edu/home>

First Cats: <https://thrive.arizona.edu/first-cats>

Fostering Success:
<https://fosteringuccess.arizona.edu/>

Handshake – UA’s job board and career development platform:
<https://career.arizona.edu/jobs/handshake>

Financial Freedom Club

[Financial Freedom Club | Norton School of Family and Consumer Sciences
\(arizona.edu\)](#)