

Personal and Family Financial
Planning 2026 - 2027 Catalog
Checklist

<https://norton.arizona.edu/undergraduate/advising/pffp-advising>

UA Foundations & General Education

COMPOSITION (Select ONE Sequence)

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

MATH

MATH 112: College Algebra _____

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

Total Units: _____

TIER ONE GENERAL EDUCATION (two courses in each category)

INDIVIDUALS & SOCIETIES (150)

NATURAL SCIENCES (170)

TRADITIONS & CULTURES (160)

TIER TWO GENERAL EDUCATION (one course in each category)

Arts _____

Humanities _____

Natural Sciences _____

Diversity (can be fulfilled with approved GE course) _____

Total Units: _____

PFFP Supporting Coursework

HECL 120 or BE 120 or MIS 111: Computing Applications _____

RCSC 220 or ACCT 250: Accounting Class _____

ECON 200: Basic Economic Issues _____

HECL 201 or PSY 230 or BNAN 276 or SOC 375: Statistics _____

HECL 202 or PSY 290A or SOC 374: Research Methods _____

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 _____

PFFP 470: Prof Tech for Fin Planners _____

PFFP 476: Retail Finance Services _____

Total Units: _____

Supporting Electives

Choose 4 Courses (12 units) from the following:

PFFP 302: Family and Consumer Personal Finance

HDFS 413: Issues in Aging

HDFS 401: Basic Skills in Counseling

PFFP 320: Client Communication for Financial Planners

HDFS 427A: Mental Health & the Family (Adulthood)

PFFP 495A: Securities Industry Essentials (SIE) Exam Prep

OR: other 300/400-level course in AREC, HECL, HDFS, or RCSC
(dependent on prerequisites)

1. _____

3. _____

2. _____

4. _____

Total Units: _____

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General Electives/ Minor: (10-12 units may be needed to reach 120 units)

NOTE: A minimum of 120 units is required. 56 units must be university level; 42 must be upper division (300, 400 level). A minimum GPA of 2.0 is required for graduation.

Total Earned Units _____ / **120**

Earned Upper Division Units _____ / **42**

Earned University Level Units _____ / **56**

Total Units: _____

PFFP Course Information: Prerequisites & Typical Course Offerings		
PFFP Upper Division		
PFFP 310	Fundamentals of PFFP	Offered: Fall & Spring
PFFP 311	Applied Family Investment Planning and Savings Strategies	Offered: Fall, Spring, & Summer
PFFP 314	Personal and Family Risk Management	Offered: Fall & Spring
PFFP 315	Applied Personal and Family Income Tax Planning	Offered: Fall & Spring
PFFP 402	Personal and Family Estate Planning	Offered: Fall & Spring
PFFP 403	Retirement Savings and Family Income Strategies	Offered: Fall & Spring
PFFP 406	Professional Conduct and Fiduciary Responsibility	Offered: Fall
PFFP 498	Capstone	Required Prerequisite: Completion of PFFP 310, and PFFP 311, and PFFP 314, and PFFP 315, and PFFP 402, and PFFP 403 Offered: Spring & Summer
PFFP 493	Internship	Offered: Fall, Spring, & Summer
PFFP Prerequisites		
Additional supporting courses required, see checklist for additional requirements		
RCSC 220	Markets, Finance and Retailing	Offered: Fall & Spring
HECL 201	Introduction to Statistics	Offered: Fall, Spring, & Summer
HECL 202	Introduction to Research Methods	Offered: Fall, Spring, & Summer
Additional Required Coursework		
HECL 301	Applying Critical Thinking	Offered: Fall, Spring, & Summer
PFFP 370	Legal and Ethical Issues in Retailing	Offered: Spring
RCSC 346	Fundamentals of Marketing	Offered: Fall
PFFP 476	Retail Finance Services	Offered: Spring
Supporting Electives		
Choose 4 Courses (12 units) from the following OR: other 300/400-level course in AREC, HECL, HDFS, or RCSC (dependent on prerequisites)		
HECL 302	Family and Consumer Personal Finance	Offered: Fall & Spring
HDFS 413	Issues in Aging	Recommended Prerequisite: HDFS 117 or equivalent course (e.g., EDP/HDFS/PSY 200, PSY 240) OR 6 units of social science Offered: Fall, Spring, & Summer
HDFS 401	Basic Skills in Counseling	Recommended Prerequisite: 6 units of social science Offered: Fall & Spring
PFFP 320	Client Communication for Financial Planners	Offered: Summer
PFFP 470	Financial Technology for Financial Planners	Offered: Fall
*Course offerings are subject to change each semester based on department ability to offer coursework		