

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 2<sup>nd</sup>  
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) \_\_\_\_\_

**UNIV 301: General Education (1 unit)** \_\_\_\_\_

**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 476: Retail Finance Services \_\_\_\_\_

PFFP 470: Prof Technology for Fin Planners \_\_\_\_\_

**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:** \_\_\_\_\_

Personal and Family Financial  
Planning 2026 - 2027 Catalog  
Checklist

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

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

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**Total 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**

PFFP Course Information: Prerequisites & Typical Course Offerings		
<b>PFFP Upper Division</b>		
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
<b>PFFP Prerequisites</b>		
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
<b>Additional Required Coursework</b>		
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
<b>Supporting Electives</b>		
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
<b>*Course offerings are subject to change each semester based on department ability to offer coursework</b>		