

Personal and Family Financial
Planning 2024 – 2025 Catalog
Checklist

<https://norton.arizona.edu/pffp-catalog-checklists>

UA Foundations & 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: _____

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 Prerequisites

HECL 120 or MIS 111: Computing applications _____
 RCSC 220 or ACCT 250 or ACCT 200: Accounting Class _____
 ECON 200: Basic Economic Issues _____
 HECL 201 or PSY 230, 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

*Must earn B or better in HECL 301 or ENGL 307 if B was not earned in ENGL 102, ENGL 108, or ENGL 109

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
 PFFP 320: Client Communication for Financial Planners
 PFFP 470: Financial Technology for Financial Planners
 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 2024 – 2025 Catalog
 Checklist

<https://norton.arizona.edu/pffp-catalog-checklists>

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: Spring |
| 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 | | |