



2023-2024 Certificate

Certificate: PERSONAL FINANCIAL PLANNING (90-101-2)

Credits: 10 Credits

Description: Earners of the Gateway Technical College Financial Planning certificate apply principles of finance and accounting to financial planning, from the perspective of the individual and family unit. Earners are able to plan family spending and make risk management (insurance), tax, wealth, accumulation, investing, and wealth distribution decisions.

Related Program: Accounting

The sequence shown is the recommended path to completion. Courses will be scheduled in the terms indicated here.
All courses should be taken in the order shown to help you stay on track and graduate according to your academic plan.
Courses in this program may be offered in a variety or combination of formats (for example: in-person, video conferencing, online, etc.).

REQUIRED COURSES

NOTE: Requisites (prereq- before/ coreq-with)
O = Online, F=Fall, S=Spring, SU=Summer

| ✓ | Term One | Cr. | Prerequisite | Corequisite | O |
|---|-------------------------------------|-----------|--------------|-------------|--------|
| | 102-122 Investments | 3 | | | F/S/SU |
| | 114-101 Personal Financial Planning | 3 | | | F/S/SU |
| | 101-104 Income Tax Accounting | 4 | | | F/S/SU |
| | Total Credits | 10 | | | |

NOTE: Students must complete a certificate program with a minimum of a 2.0 Program GPA.