UF WARRINGTON COLLEGE of BUSINESS

Heavener School of Business
Fisher School of Accounting
Hough Graduate School of Business

GENERAL FACULTY MEETING AGENDA | THURSDAY, OCTOBER 29, 2020| 2:00PM| ZOOM

1. The Undergraduate Committee voted to approve the following item and requests approval by the faculty.

    MINOR IN WEALTH MANAGEMENT
    Rationale**:** This minor is designed to provide students with a solid understanding of the concepts and techniques used by wealth management and insurance advisors and practitioners to assist individual and institutional clients. Students will gain the necessary skills to help individuals and firms meet the expanding needs of their client base.
    Credit Hours: 28
    Prerequisites:
    i) Intro to Financial Accounting (ACG 2021, 4 credits)
    ii) Intro to Economics (ECO 2023, 4 credits)
    iii) Introduction to Finance (FIN 3403, 4 credits)
    Required Courses:
    FIN 3124 Introduction to Financial Planning & Wealth Management (4 Credits)
    - Prerequisite required: FIN 3403

    RMI 3011 Risk Management and Insurance (4 Credits)
    - Prerequisite required: ACG2021 or ECO2013 or ECO2023

    FIN 4132 Estate & Tax Planning (4 Credits)
    - Prerequisite required: FIN 3124

    FIN 4128 Financial Plan Development (4 Credits)
    - Prerequisite required: RMI 3011 and FIN 3124; Co-requisite required: FIN 4132

2. Career Services Update – Craig Petrus

3. Other Business

4. Dean’s Report

GRADUATE FACULTY MEETING AGENDA | THURSDAY, OCTOBER 29, 2020| 2:00PM| ZOOM (*Immediately following the General Faculty Meeting*)

1. Other Business

2. Dean’s Report

Minor|New for request 15340

Info

Request: Minor in Wealth Management
Description of request: The Warrington College of Business is requesting the creation of a new minor in Wealth Management.
Submitter: Erica Studer-Byrnes erica.byrnes@warrington.ufl.edu
Created: 10/13/2020 3:14:23 PM
Form version: 1

Responses

Existing Degree Program Name Bachelor of Science in Business Administration
CIP Code 52.0801
Existing Minor(s) Business Administration
Business Administration (UFO)
Entrepreneurship
Information Systems
Professional Selling
Real Estate
Retailing
Proposed Minor Name Wealth Management
Proposed Transcript Title (Maximum 50 characters) Minor in Wealth Management
Code WMT
Credits 28
Number of Students 150
Effective Term Earliest Available
Effective Year 2021
Percentage of Credits Available Fully Online <50%
Percentage of Credits Available Off-Campus <25%
Rationale and Place in Curriculum This minor is designed to provide students with a solid understanding of the concepts and techniques used by wealth management and insurance advisors and practitioners to assist individual and institutional clients. Students will gain the necessary skills to help individuals and firms meet the expanding needs of their client base.
Impacts on Other Programs Currently, CALS offers two courses that are in the disciplinary topic of wealth management. We have actively worked with them throughout the development of this minor, and have their support to proceed. None of the courses for the minor overlap with the unique content of the courses offered by CALS.

July 6, 2020

MEMORANDUM

To:

Alex Sevilla, Associate Dean & Director Heavener School of Business

From:

Andy Naranjo – FIRE Department Unit Head

RE:

Wealth Management Minor

The Finance, Insurance, and Real Estate faculty met via Zoom to discuss the offering of a Wealth Management Minor with the curriculum noted below. The faculty voted via Qualtrics and unanimously approved the creation of this Wealth Management Minor. This Wealth Management Minor will provide an important and highly valuable educational foundation and career path in the financial and insurance services industries for students who complete it. This minor will also enable non-finance majors to obtain necessary course work for important career and professional certification such as Certified Financial Analysts (CFA), Certified Financial Planners (CFP), Certified Insurance Counselors (CIC), and Certified Risk Managers (CRM).

Wealth Management Minor

This minor is designed to provide students with a solid understanding of the concepts and techniques used by wealth management and insurance advisors and practitioners to assist individual and institutional clients. Students will gain the necessary skills to help individuals and firms meet the expanding needs of their client base.

Wealth Management Minor Curriculum: 28 credit hours

Required Prerequisites:

i) Intro to Financial Accounting (ACG 2021, 4 credits); ii) Intro to Economics (ECO 2023, 4 credits); iii) Introduction to Finance (FIN 3403, 4 credits)

Required Courses:

1. **FIN 3124 Introduction to Financial Planning & Wealth Management (4 Credits)**
   - **Prerequisite required: FIN 3403**

2. **RMI 3011 Risk Management and Insurance (4 Credits)**
   - **Prerequisite required: ACG2021 or ECO2013 or ECO2023**

3. **FIN 4132 Estate & Tax Planning (4 Credits)**
   - **Prerequisite required: FIN 3124**

4. **FIN 4128 Financial Plan Development (4 Credits)**
   - **Prerequisite required: RMI 3011 and FIN 3124; Co-requisite required: FIN 4132**

This Wealth Management Minor will provide our business undergraduates with a solid educational foundation and essential undergraduate business major career and professional certification opportunities. This specialization is fully in line with our business college peer and aspiration peer programs and necessary to make our program and students competitive.

Wealth Management

MINOR

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Wealth Management Minor

This minor is designed to provide students with a solid understanding of the concepts and techniques used by wealth management and insurance advisors and practitioners to assist individual and institutional clients. Students will gain the necessary skills to help individuals and firms meet the expanding needs of their client base. This minor will also enable students to obtain necessary course work for important career and professional certification such as Certified Financial Analysts (CFA), Certified Financial Planners (CFP), Certified Insurance Counselors (CIC), and Certified Risk Managers (CRM).

College: Heavener School of Business
Credits: 28, completed with an overall 2.0 GPA in the minor and a cumulative 2.0 UF GPA
Contact: Email

All upper-division courses must be taken for letter grade at UF or via an approved study abroad program.

Flexible learning courses will not count toward the minor.

REQUIRED COURSES

Code	Title	Credits
ECO 2023	Principles of Microecono	4
ACG 2021	Introduction to Financial Accounting [1]	4
FIN 3403	Business Finance [1]	4
FIN 3124	Introduction to Financial Planning & Wealth Management [1]	4
RMI 3011	Risk Management and Insurance [1]	4
FIN 4132	Estate &	4

FIN 4132	Estate & Tax Planning[1]	4
FIN 4128	Financial Plan Developmen[1]	4
Total Credits Course List		**28**

[1] Course has prerequisites.