

REQUIREMENTS FOR THE UNDERGRADUATE CERTIFICATE
MICHAEL F. PRICE COLLEGE OF BUSINESS
THE UNIVERSITY OF OKLAHOMA

Academic Year
For Students Entering the Oklahoma State System for Higher Education Summer 2025 through Spring 2026

General Requirements
Minimum Total Credit Hours 15

Program
Wealth Management T735 Undergraduate Certificate

CERTIFICATE REQUIREMENTS

The Wealth Management Certificate will provide undergraduate students with focused preparation for careers in Wealth Management. Students will be educated regarding insurance, estate planning, retirement planning, and investments. Students will take the Wealth Management Strategies course which will cover case analysis and integration of the six major areas of personal financial planning (Fundamentals of Financial Planning, Insurance Planning, Investment Planning, Income Tax Planning, Retirement Planning and Estate Planning).

Code	Title	Credit Hours
Required Courses		
FIN 2303	Business Finance	3
FIN 3203	Principles of Insurance	3
FIN 4143	Retirement Planning	3
FIN 4153	Estate Planning	3
FIN 4663	Wealth Management Strategies	3
Total Credit Hours		15

More information in the catalog: (<http://ou-public.courseleaf.com/price-business/finance/wealth-management-undergrad-cert/>).