

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

| Academic Year   | General Requirements                | Program  |
|---|-------------------------------------|--|
| For Students Entering the Oklahoma State System for Higher Education<br>Summer 2025 through Spring 2026 | Minimum Total Credit Hours ..... 15 | Wealth Management<br>T735<br>Undergraduate Certificate |

**Minimum Total Credit Hours: 15**

**Program Code: T735**

## 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 |
|---------------------------|------------------------------|--------------|
| <b>Required Courses</b>   |                              |              |
| 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            |
| <b>Total Credit Hours</b> |                              | <b>15</b>    |

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