

Personal financial planning

1. Identify the relevant elements and analyze, develop, implement, monitor, and revise effective risk management planning strategies to address client objectives.
2. Identify the relevant elements and analyze, develop, implement, monitor, and revise effective investment planning strategies to address client objectives.
3. Identify the relevant elements and analyze, develop, implement, monitor, and revise effective income tax planning strategies to address client objectives.
4. Identify the relevant elements and analyze, develop, implement, monitor, and revise effective pre- and post-retirement planning strategies to address client objectives.
5. Identify the relevant elements and analyze, develop, implement, monitor, and revise effective estate planning strategies to address client objectives.
6. Demonstrate mastery of the major goals of Personal Financial Planning, including an advanced knowledge of ethics, through a directed case study analysis or a thesis.

Finance

1. Demonstrate competencies in macro- and microeconomic systems and their application in developing, implementing, and monitoring effective global financial strategies.
2. Identify and analyze appropriate financial models for use in security and firm valuation, risk and return measurement, and portfolio performance evaluation.
3. Identify and apply financial statement analysis, investment tools, and asset valuation to investment management.
4. Apply effective capital budgeting techniques, case management strategies, and risk management strategies in a corporate finance setting.
5. Demonstrate effective decision-making competencies to balance financial goals with acceptable ethical standards and social norms.
6. Demonstrate applicable analytical and research competencies to successfully complete a capstone or thesis requirement.