PERSONAL WEALTH MANAGEMENT AND FINANCIAL ADVISING, UCRT

Requirements for Students Matriculating in or before Academic Year 2026-2027. Learn more about University Academic Regulation 3.1 (https://catalog.okstate.edu/university-academic-regulations/#matriculation).

A student may not have a grade lower than "C" and must maintain a grade-point-average of 3.0 over all courses applicable to this certificate.
Total Hours: 18

Code	Title	Hours
Required Courses		
FIN 4223	Investments	3
ACCT 4073	Tax Planning for Financial Professionals	3
FIN 3613	General Insurance	3
FIN 4023	Retirement and Employee Benefit Planning	3
FIN 4033	Estate Planning	3
FIN 4233	Financial Planning Capstone Course	3
Total Hours		**18**