

**SAN DIEGO STATE UNIVERSITY
ADVISING SHEET
Master of Science in Business Administration
Concentration in Financial and Tax Planning**

Name _____

Red ID Number # _____ - _____ - _____

Phone _____ - _____ - _____

Address _____

Email: _____

Prerequisites:

Met	Not Met		Met	Not Met	
_____	_____	Financial Acct ¹ (ACCT 201 or equiv.)	_____	_____	Finance ¹ BA 629 (323)
_____	_____	Econ(6 units) ¹ (101,102 or equiv.)	_____	_____	Bus Cycles ² , Inter Macro or Fin 659 ³
_____	_____	Statistics ¹ (STAT 119 or equiv.)	_____	_____	Legal Environment ¹ or FIN 240,604 ³

Required Courses:

3	FIN 589 ¹	Personal Financial Planning	F,S	_____	_____
3	FIN 522 ¹	Individual Insurance Management	F,S	_____	_____
3	FIN 585 ¹	Seminar in Estate Planning	S	_____	_____
3	FIN 651 ¹	Seminar in Investments	F,S	_____	_____
3	ACCT 503 ¹	Federal Taxation of Individuals	F,S,Sm	_____	_____
3	FIN 590 ¹	Financial Planning Practicum ¹	S	_____	_____

Elective Courses (Select 4 courses):

3	FIN 652 ^{2,3}	Seminar in Secur. Analysis & Port Mgt.	F,S	_____	_____
3	ACCT 655 ³	Tax Planning for Individuals	F	_____	_____
3	FIN 659 ²	Decision Making in a World Economy	F	_____	_____
3	ACCT 620 ² or	Financial Reporting and Analysis II	F,S	_____	_____
3	ACCT 663 ²	Financial Statement Analysis	F,S,Sm	_____	_____
3	FIN 783 Or	Seminar in RE Investment and Development	S	_____	_____
3	FIN 784	Seminar in RE Finance and Valuation	F	_____	_____
3	FIN 642 ²	Financial Risk Management	?	_____	_____
3	FIN 656	Seminar in Financial Institutions	S	_____	_____
3	ACCT 650 or	Tax Research and Planning	F,Sm	_____	_____
3	ACCT 656	California & Multistate Taxation	F	_____	_____
3	CSP 600,L	Cross-Cultural Counseling Communication Skills	F,S	_____	_____
3	other	_____		_____	_____
3	other	_____		_____	_____
3	other	_____		_____	_____

¹Required for SDSU Personal Financial Planning report to the CFP Board

²Recommended for CFA Exam Preparation

³econ and or law prerequisite waived if FIN 659 or FIN 604 on program (604 needs grad office approval)

Adviser Signature _____ rev.5/15