

BUSINESS ADMINISTRATION

FINANCIAL PLANNING

ASPIRE

EXPERIENTIAL MAJOR MAP

FINANCIAL PLANNING RETURN ON INVESTMENT

Turn financial expertise into a career helping others succeed.

Financial decisions have become increasingly complex, creating demand for professionals who can provide trusted guidance on investments, retirement, insurance, taxes, and wealth management. West Liberty University's Financial Planning concentration prepares students to develop comprehensive financial strategies, build meaningful client relationships, and pursue professional opportunities in one of the fastest-growing areas of business and finance.

THE WHO...

- Future Financial Advisors
- Investment & Wealth Management Enthusiasts
- Relationship-Oriented Professionals
- Ethical Financial Leaders

THE SKILLS ...

- Comprehensive Financial Planning
- Investment & Wealth Management
- Professional Ethics & Client Advising
- Communication & Technical Skills

THE JOBS ...

- Financial Planner/Advisor
- Wealth Management Associate
- Investment Advisor
- Retirement Planning Specialist
- Insurance & Risk Management
- Private Banking/Client Relationship Associate

WHAT YOU'LL LEARN

Graduates are prepared for careers across financial planning, wealth management, banking, insurance, investment services, and client advisory professions. The program provides a strong academic foundation for pursuing CFP® certification and advancing into leadership opportunities throughout the financial services industry. As a CFP® Board-Registered program, the curriculum fulfills the educational requirements necessary to pursue CFP® certification while building the technical expertise, ethical judgment, and client-service skills.

HILLTOP ADVANTAGE

The Hilltop Advantage is a structured, student-centered approach that ensures every student graduates with not only a degree, but also meaningful experiences, career-ready skills, and a clear post-graduation plan.

THE PROGRAM

- CFP® Board-Registered Program
- Industry-Relevant Curriculum
- Experienced Faculty
- Applied Learning Opportunities
- Career-Focused Preparation
- MBA Fast Track Option

College of Business - Financial Planning

ASPIRE	FIRST YEAR	MIDDLE YEARS	LAST YEAR	GRADUATE PROGRAMS
A ACADEMIC MASTERY	- Complete foundational coursework - Develop analytical and communication skills - Build quantitative reasoning skills.	- Complete core coursework - Develop an understanding of personal finance, financial markets, and wealth management. - Develop knowledge of financial planning processes and client needs analysis.	- Complete advanced and capstone coursework - Demonstrate mastery of the financial planning process. - Integrate knowledge from investments, taxes, retirement, insurance, and estate planning. - Learn the ethical responsibilities of financial professionals.	Master of Business Administration (MBA)
S SELF- DISCOVERY & STRENGTHS	- Explore career pathways in financial planning - Reflect on personal interests related to helping individuals and families achieve financial goals.	- Clarify professional interests and specialization areas. - Develop a personal philosophy of client service and fiduciary responsibility. - Assess strengths in planning, advising, and relationship management. - Establish long-term professional goals	- Articulate personal values, professional goals, and advising philosophy. - Develop a long-term professional development plan. - Reflect on growth as a trusted financial advisor and financial wellness advocate. - Identify future specialization and credentialing goals.	Industry Sectors - Financial Services - Banking - Insurance - Investment Management - Corporate Finance - Accounting/Tax services - Govt. / Non-Profit sectors
PI PROFESSIONAL PREPARATION INTEGRATIVE & EXPERIENTIAL LEARNING	- Develop a professional résumé and LinkedIn profile. - Attend financial planning and wealth management career events. - Conduct informational interviews with financial professionals.	- Complete a financial planning internship or wealth management experience. - Conduct case analyses and financial plan development projects. - Learn basic financial planning software and tools. - Build a professional portfolio. - Begin preparation for CFP® certification requirements and examination pathway	- Complete a capstone financial planning case for a comprehensive client scenario. - Finalize a professional portfolio demonstrating planning competencies. - Secure employment, graduate school admission, or professional training opportunities. - Prepare for CFP® certification and other industry credentials	Career Opportunities - Financial Planner/Advisor - Wealth Management Associate - Investment Advisor Representative - Retirement Planning Specialist - Insurance & Risk Management - Private Banking/Client Relationship Associate
RE RELATIONSHIPS & LEADERSHIP ENGAGEMENT & WELL-BEING	- Join Financial Planning Association (FPA) or National Association of Personal Financial Advisors (NAPFA) as a student member. - Connect with faculty, alumni, and industry mentors. - Develop habits that support academic success and personal financial well-being	- Serve in leadership roles within student organizations - Investment Club. - Mentor first- and second-year students. - Attend professional conferences and industry networking events. - Develop confidence in client communication and professional presentations	- Strengthen mentoring relationships with faculty and industry professionals. - Support financial literacy outreach efforts. - Engage with professional organizations such as FPA and CFP Board-affiliated programs. - Develop strategies for lifelong professional growth, resilience, and personal financial well-being.	