

# FINANCIAL PLANNING AND MODELING, POST-BACCALAUREATE CERTIFICATE

Personal financial planning refers to the systematic and dynamic process whereby individuals optimize their financial resources (taking into account various financial risks and future life events) to best achieve their financial goals and objectives. Saint Louis University's post-baccalaureate certificate in financial planning and modeling prepares SLU students for careers in financial planning and advising services.

Financial planning skills are essential for everyone – not just those pursuing careers as professional financial advisors. Research consistently shows that individuals who develop sound financial habits early are better positioned to achieve long-term goals such as investing, wealth accumulation and retirement security. Building a strong foundation in personal finance empowers individuals to make informed decisions, manage risk and create lasting financial stability over time.

## Admission Requirements

The Chaifetz School uses a holistic admissions approach to carefully evaluate all applicants, considering every aspect of their application. While an undergraduate degree is required for admission, a business background is not. Applicants may be required to submit their:

- Completed online application (<https://gradapply.slu.edu/apply/>)
- Transcript(s) from all previously attended institutions
- 1-2 letters of recommendation
- Résumé/CV

Applications are reviewed on a rolling basis once all application materials are received. The average time for admissions decisions is two weeks.

## Tuition

Tuition	Cost Per Credit
School of Business Master's and Certificate Programs	\$1,390

Additional charges may apply. Other resources are listed below:

Information on Tuition and Fees (<https://catalog.slu.edu/academic-policies/student-financial-services/tuition/>)

Miscellaneous Fees (<https://catalog.slu.edu/academic-policies/student-financial-services/fees/>)

Information on Summer Tuition (<https://catalog.slu.edu/academic-policies/student-financial-services/tuition-summer-current/>)

## Scholarships and Financial Aid

For more information about Saint Louis University scholarships and financial aid, please visit the Office of Student Financial Services (<https://www.slu.edu/financial-aid/types-of-aid/>).

## Accreditation

The Richard A. Chaifetz School of Business is accredited by the Association to Advance Collegiate Schools of Business (AACSB), the world's largest business education alliance and accrediting body of business schools, ensuring continuous quality improvement in terms of curriculum, instructional resources, student selection, career placement and intellectual contributions and qualifications of the faculty. Approximately 5% of business schools worldwide have achieved AACSB accreditation.

## Learning Outcomes

- Graduates will analyze problems, make decisions and present results on financial modeling and analysis.
- Graduates will understand, recognize and evaluate ethical decision-making in financial planning and modeling.

## Requirements

Code	Title	Credits
FIN 6160	Investment Theory and Practice	3
FIN 6540	Financial Planning	3
FIN 6530	Financial Modeling and Analysis	3
<b>Total Credits</b>		<b>9</b>

All courses have FIN 6000 Finance for Managers (3 cr) as a prerequisite. This may be waived upon completion of any CFA program exams or at the discretion of the department chair.

## Continuation Standards

Students must maintain a cumulative grade point average (GPA) of 3.00 in all graduate/professional courses.

## Roadmap

This roadmap is just one example of a semester-by-semester plan of study for this program. There are other plans students can and do take. The plan of study for each particular student is established in consultation with each student's academic advisor; *this roadmap does not replace academic advising appointments.*

Roadmap notes:

- This Roadmap assumes full-time enrollment unless otherwise noted.
- Courses/Milestones marked with an "!" are critical and must be completed in the semester listed in the Roadmap to ensure a timely graduation.
- Course availability and sequencing are subject to change.

Course	Title	Credits
<b>Year One</b>		
<b>Fall</b>		
FIN 6540	Financial Planning	3
FIN 6160	Investment Theory and Practice	3
<b>Credits</b>		<b>6</b>
<b>Spring</b>		
FIN 6530	Financial Modeling and Analysis	3
<b>Credits</b>		<b>3</b>
<b>Total Credits</b>		<b>9</b>

## Contact Us

For additional admission questions, please contact:

**Chaifetz Business Programs Office**  
Graduate Business Admission Team  
314-977-3800  
gradbiz@slu.edu

Request Information ([https://www.slu.edu/business/graduate/request-info.php?\\_ga=2.149964213.2062578250.1775057932-127231973.1726158023](https://www.slu.edu/business/graduate/request-info.php?_ga=2.149964213.2062578250.1775057932-127231973.1726158023))