



**Fowler College of Business**

**ADVISING WORKSHEET FOR THE MASTER OF SCIENCE IN BUSINESS ADMINISTRATION  
CONCENTRATION IN FINANCIAL TAX PLANNING**

Name: \_\_\_\_\_ RedID: \_\_\_\_\_

Phone: \_\_\_\_\_ Address: \_\_\_\_\_

Email: \_\_\_\_\_

**PREREQUISITES:**

<i>MET</i>	<i>NOT MET</i>	Financial Acct <sup>1</sup> (ACCT 201 or equiv.)	<i>MET</i>	<i>NOT MET</i>	Finance <sup>1</sup> (BA 323 or 629 or equiv.)
_____	_____	Econ <sup>1</sup> (ECON 101 & 102 or equiv.)	_____	_____	Bus Cycles <sup>2</sup> , Intermed. Macro, or FIN 659 <sup>3</sup>
_____	_____	Statistics <sup>1</sup> (STAT 119 or equiv.)	_____	_____	Legal Environment <sup>1</sup> or FIN 240 or 604 <sup>3</sup>

			Units	Grade
<b>REQUIRED COURSES</b>	FIN 589 <sup>1</sup>	Personal Financial Planning	3	
	FIN 522 <sup>1</sup>	Individual Insurance Management	3	
	FIN 585 <sup>1</sup>	Seminar in Estate Planning	3	
	FIN 651 <sup>1</sup>	Seminar in Investments	3	
	ACCTG 503 <sup>1</sup>	Federal Taxation of Individuals	3	
	FIN 590 <sup>1</sup>	Financial Planning Practicum	3	
<b>ELECTIVE COURSES (SELECT 4)</b>	FIN 652 <sup>2,3</sup>	Seminar in Security Analysis & Portfolio Mgt.	3	
	ACCTG 655 <sup>3</sup>	Tax Planning for Individuals	3	
	FIN 659 <sup>2</sup>	Decision Making in a World Economy	3	
	ACCTG 620 <sup>2</sup>	Financial Reporting and Analysis II	3	
	or ACCTG 663 <sup>2</sup>	Financial Statement Analysis	3	
	FIN 783	Seminar in RE Investment and Development	3	
	or FIN 784	Seminar in RE Finance and Valuation	3	
	FIN 642 <sup>2</sup>	Financial Risk Management	3	
	FIN 656	Seminar in Financial Institutions	3	
	ACCTG 650	Tax Research and Planning	3	
	or ACCTG 656	California and Multistate Taxation	3	
	CSP 600L	Cross-Cultural Counseling Practicum	3	
		(other)	3	
	(other)	3		
	(other)	3		

**ADVISOR SIGNATURE** \_\_\_\_\_

<sup>1</sup>Required for SDSU Personal Financial Planning Report to the CFP Board  
<sup>2</sup>Recommended for CFA Exam Preparation  
<sup>3</sup>Econ or Law prerequisite waived if FIN 659 or FIN 604 is listed on Program of Study