

**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 <sup>1</sup> (ACCT 201 or equiv.) | _____ | _____   | Finance <sup>1</sup> BA 665                                      |
| _____ | _____   | Econ(6 units) <sup>1</sup> (101,102 or equiv.)   | _____ | _____   | Bus Cycles <sup>2</sup> , Inter Macro<br>or Fin 659 <sup>3</sup> |
| _____ | _____   | Statistics <sup>1</sup> (STAT 119 or equiv.)     | _____ | _____   | Legal Environment <sup>1</sup><br>or FIN 240,604 <sup>3</sup>    |

**Required Courses:**

|   |                       |                                           |        |       |
|---|-----------------------|-------------------------------------------|--------|-------|
| 3 | FIN 657 <sup>1</sup>  | Financial Counseling                      | F      | _____ |
| 3 | FIN 522 <sup>1</sup>  | Individual Insurance Management           | F,S    | _____ |
| 2 | FIN 523 <sup>1</sup>  | Employee Benefit Planning                 | F      | _____ |
| 3 | FIN 705 <sup>1</sup>  | Seminar in Estate Planning                | S      | _____ |
| 3 | FIN 651 <sup>1</sup>  | Seminar in Investments                    | F,S    | _____ |
| 3 | ACCT 503 <sup>1</sup> | Federal Taxation of Individuals           | F,S,Sm | _____ |
| 1 | FIN 590 <sup>1</sup>  | Financial Planning Practicum <sup>1</sup> | F,S    | _____ |

**Elective Courses (Select 4 courses):**

|   |                             |                                          |        |       |
|---|-----------------------------|------------------------------------------|--------|-------|
| 3 | FIN 652 <sup>2,3</sup>      | Seminar in Secur. Analysis & Port Mgt.   | F,S    | _____ |
| 3 | ACCT 655 <sup>3</sup>       | Tax Planning for Individuals             | F      | _____ |
| 3 | FIN 659 <sup>4</sup>        | Decision Making in a World Economy       | F      | _____ |
| 3 | ACCT 620 <sup>2</sup>       | Financial Reporting and Analysis II      | F,S    | _____ |
| 3 | or<br>ACCT 663 <sup>2</sup> | Financial Statement Analysis             | F,S,Sm | _____ |
| 3 | FIN 783                     | Seminar in RE Investment and Development | S      | _____ |
| 3 | Or<br>FIN 784               | Seminar in RE Finance and Valuation      | F      | _____ |
| 3 | FIN 642 <sup>2</sup>        | Financial Risk Management                | ?      | _____ |
| 3 | FIN 656                     | Seminar in Financial Institutions        | S      | _____ |
| 3 | ACCT 650                    | Tax Research and Planning                | F,Sm   | _____ |
| 3 | or<br>ACCT 656              | California & Multistate Taxation         | F      | _____ |
| 3 | CSP 610A                    | Deter. Human Behavior-Personality        | ?      | _____ |
| 3 | other                       | _____                                    |        | _____ |
| 3 | other                       | _____                                    |        | _____ |
| 3 | other                       | _____                                    |        | _____ |

<sup>1</sup>Required for SDSU Certificate in Personal Financial Planning

<sup>2</sup>Recommended for CFA Exam Preparation

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

Adviser Signature \_\_\_\_\_ rev.1/09