15. Special Consideration

**College of Agriculture and Life Sciences**
Department of Agricultural Economics
Minor in Financial Planning
Request for a new minor
SPECIAL CONSIDERATION
SPECIAL CONSIDERATION

COLLEGE OF AGRICULTURE AND LIFE SCIENCES
DEPARTMENT OF AGRICULTURAL ECONOMICS
MINOR IN FINANCIAL PLANNING
REQUEST FOR A NEW MINOR
August 18, 2014

MEMORANDUM

To: Dr. Tim Scott, Chair, Texas A&M University Undergraduate Curriculum Committee

Through: Dr. Kim Dooley, Associate Dean for Undergraduate Programs, College of Agriculture and Life Sciences

Through: Dr. Robert Knight, Chair, College of Agriculture and Life Sciences Undergraduate Program Committee

From: Dr. Parr Rosson, Professor and Head, Department of Agricultural Economics

Subject: Request for New Minor in Financial Planning

The proposed minor in Financial Planning requires completion of six 400-level courses for a total of 18 credits. The program is designed to prepare students for careers in the growing professional field of financial planning and will be available to all Texas A&M undergraduate students, who meet the conditions.

An additional benefit of the program is that it will satisfy the education requirements of the CFP Board of Standards to sit for the exam to receive the CERTIFIED FINANCIAL PLANNERTM (CFP®) designation. Go to http://cfp.net.

The conditions for admission to the minor program are junior or senior classification, an introductory finance course (AGEC 330, FINC 409 or FINC 341), and a GPR of 2.5 or higher. All six courses must be taken for academic credit with a grade of C or better to complete the minor.

Concurrent with this request for the new minor program are three requests to establish permanent course numbers for three of the courses required in the program: AGE 438 Investment Planning, AGE 439 Retirement Planning, and AGE 441 Financial Planning Capstone. These courses have all been taught at least once as Special Topics.

Attached are the Proposed Minor Field of Study form and a draft of the Catalog entry. For additional information, contact Gene Nelson, Senior Professor, at 979-862-2527, or nelsong@tamu.edu. We are requesting Special Consideration to expedite the approval of this request.

cc: William A. “Bill” Dugas, Acting Vice Chancellor and Dean, Agriculture and Life Sciences
   A. Gene Nelson, Senior Professor, Department of Agricultural Economics

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Texas A&M University  
Proposed Minor Field of Study

Name of Minor Program: Financial Planning

Department: Agricultural Economics

College: Agriculture and Life Sciences

Will grant a minor ☑ Yes ☐ No  Academic Year: 2015 - 2016

A selection from among the following courses will constitute a minor field of study.

A. The following _18_ hours of course work are required.
   - AGEC 435 Financial Planning for Professionals
   - AGEC 436 Insurance and Estate Planning
   - AGEC 437 Tax Planning
   - AGEC 438 Investment Planning
   - AGEC 439 Retirement Planning
   - AGEC 441 Financial Planning Capstone

B. Select _0_ hours from the following courses.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Please indicate further requirements such as grade point requirement, prerequisites, resident (if above the minimum 6 hours at the 300- to 400-level), capstone or methods courses.

Minimum of _13_ hours required.

Minimum of 6 hours at 300- to 400-level

Acceptance to the minor requires junior or senior classification and a GPR of a 2.5 or higher.

Completion of the minor requires a grade of "C" or better for each required course.

Reviewed and approved by:

[Signature] 8/19/14 [Signature] 9/25/14
Department Head/Program Director  Date AOC Dean of College  Date
Minor in Financial Planning

The minor in Financial Planning prepares students for leadership roles in this growing profession. Financial planners advise their clients about financial decisions, including budget management, insurance, investments, taxes, retirement, and estate planning. Their goal is to assist clients in achieving their financial goals in an increasingly complex economy. The six-course curriculum (18 credit hours) also satisfies the educational requirements to be eligible to sit for the exam portion of the CERTIFIED FINANCIAL PLANNER™ (CFP®) designation conferred by the CFP Board of Standards (http://cfp.net). Professionals who have earned this designation are in high demand in the financial services sector.

The minor in Financial Planning is available to all junior or senior undergraduate students enrolled at Texas A&M University, who have completed an introductory finance course and have an overall GPR of 2.5 or higher. Successful completion of the minor requires the courses be taken for academic credit with a grade of C or better for each course. Coursework is offered both online and in the classroom to meet students’ learning preferences. For more information about this minor and the career opportunities in Financial Planning, see http://financialplanning.tamu.edu.

Required Courses

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<tr>
<th>Course Name</th>
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<tr>
<td>AGEC 435 Financial Planning for Professionals</td>
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<tr>
<td>AGEC 436 Insurance and Estate Planning</td>
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<td>AGEC 437 Tax Planning</td>
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<td>AGEC 439 Retirement Planning</td>
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<tr>
<td>AGEC 441 Financial Planning Capstone</td>
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**total hours** 18
Thanks for letting me know. Per our previous discussions, I continue to be supportive of this initiative.

Sorin

Sorin M. Sorescu
Patricia and Bookman Peters Professor and Head
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Mays Business School at Texas A&M University
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From: Gene Nelson [mailto:nelsong@tamu.edu]
Sent: Wednesday, October 08, 2014 3:56 PM
To: Sorin Sorescu
Cc: Parr Rosson
Subject: Proposal for Minor in Financial Planning

Sorin, we wanted to inform you that our proposal for a minor program in Financial Planning will be considered by the University Curriculum Council on Friday. This minor simply combines the six courses that you have already approved.

Our understanding is that according current procedures, a letter from you is not needed. If you have any questions or concerns, please don’t hesitate to contact us.

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