

Financial planning

W. P. Carey Career Management and Employer Engagement: Business degree fast facts

As the population ages and life expectancies rise, demand for financial planning services will increase. The W. P. Carey business degree with a concentration in financial planning provides students with knowledge and experience in personal financial planning, taxes, portfolio management, insurance, and estate planning. This program will deliver to the next generation of financial planning professionals the knowledge and skills to develop solutions for their clients' personal financial needs.

Graduates will be well-prepared to meet Certified Financial Planner (CFP®) standards and to find meaningful employment in financial planning and wealth management, either as independent professionals or as part of a larger organization. According to the Bureau of Labor Statistics, financial planners earn a median salary of \$88,890 per year with a bachelor's degree. The financial planning profession has a "much faster than average" growth and it's forecasted that there will be 40,000 additional jobs added to the field over the next ten years.¹

Map your future in financial planning

Personal financial advisor

Personal financial advisors primarily assist clients with financial lifestyle planning. This includes budgeting, cash flow planning, and savings for college and retirement. This can also include investment management and advisory. Personal financial advising varies greatly depending on company, size of firm, and target clientele.

Wealth manager

Wealth managers provide services to high net worth individuals (HNWI) and ultra high net worth individuals (UHNWI). Services may also be provided to institutional investors, such as companies or organizations. These services include capital gains planning, estate planning, retirement planning, legal planning, and risk management among others.

Insurance agent/broker

Insurance agents work with customers to identify insurance needs and sell appropriate products. Insurance agents commonly sell one or more types of insurance, such as property and casualty, life, health, and long-term care insurance. Insurance agents may work for a single insurance company or an insurance brokerage.

Add value to your degree

As a W. P. Carey student, your classroom experience is just one part of your preparation for a successful career. A variety of extracurricular opportunities provide you with practical, real-world experiences to complement your classroom studies.

Financial Management Association (FMA)

fmaasu.com

The FMA was established in 1970 and has become the global leader in developing and disseminating knowledge about financial decision making. The award-winning ASU student FMA chapter bridges the gap between academics and the professional world for students studying finance.

Certified Financial Planner (CFP) Board

cfp.net

The certified financial planner certification is the standard of excellence in financial planning. CFP® professionals meet rigorous education, training, and ethical standards, and are committed to serving their clients' best interest today to prepare them for a more secure tomorrow.

National Association of Personal Financial Advisors (NAPFA)

napfa.org

The National Association of Personal Financial Advisors (NAPFA) is the country's leading professional association of fee-only financial advisors—highly trained professionals who are committed to working in the best interests of those they serve. The association provides support and education for over 3,800 practitioners all over the country.

The Financial Planning Association (FPA)

onefpa.org

The Financial Planning Association® (FPA®) is the principal membership organization for CERTIFIED FINANCIAL PLANNER™ professionals, educators, financial services providers, and students who seek advancement in a growing, dynamic profession. The primary aim of FPA is to elevate the profession that transforms lives through the power of financial planning.

Contact

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¹ Bureau of Labor Statistics