

UC Berkeley Extension Professional Sequence in Personal Financial Planning

REQUIRED COURSES	Spring Term	Summer Term	Fall Term	Offered Future Term
X433 Survey of Personal Financial Planning	X	X	X	
X433.6 Employment Benefits and Personal Financial Planning	X	X	X	
X433.2 Estate Planning	X	X	X	
X433.1 Income Taxes and Personal Financial Planning	X	X		
X433.8 Insurance in Personal Financial Planning			X	
X433.3 Investments in Personal Financial Planning: General Principles and Methods	X		X	
X433.7 Personal Financial Planning Practicum	X		X	
ELECTIVES	Spring Term	Summer Term	Fall Term	Offered Future Term
X433.5 Real Estate Investments for Financial Planners	X			
X425.5 Financial Security Analysis	X		X	
X414.3 Understanding Wealth Management	X		X	
X414.5 Philanthropy as a Wealth Management Tool	X			
Behavioral Finance				X
X436.5 Fundamentals of Financial Risk Management			X	

Class availability is subject to change.