FINANCIAL SERVICES SALES, CERTIFICATE

Requirements for an undergraduate certificate may be completed at any campus location offering the specified courses for the certificate.

Program Description
This certificate program is designed to prepare both current and returning students for a career in a sales position in the financial services industry. The certificate recognizes the need for a baseline knowledge in financial planning and various financial products, but also the importance of personal marketing and communication skills necessary to be successful within the industry. This certificate program requires a total of 15 credit hours and can be completed concurrently with a Penn State Behrend degree or via continuing education.

What is Financial Services Sales?
Sales of financial services and instruments such as life insurance, annuities, stocks, bonds, and property and casualty insurance should be carried out by educated, informed, and ethical professionals. Penn State Behrend’s certificate in Financial Services Sales prepares you to be that professional.

You Might Like This Program If...
• You are a business major interested in the financial-services or insurance industries.
• You are looking for a client-facing career.

Program Requirements
To earn an undergraduate certificate in Financial Services Sales, a minimum of 15 credits is required.

<table>
<thead>
<tr>
<th>Code</th>
<th>Title</th>
<th>Credits</th>
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<tbody>
<tr>
<td>CAS 252</td>
<td>Business and Professional Communication</td>
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<td>FIN 330</td>
<td>Personal Financial Planning</td>
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<td>MKTG 410</td>
<td>Personal Selling</td>
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<td>CAS 203</td>
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<td>PSYCH 243</td>
<td>Introduction to Well-being and Positive Psychology</td>
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<td>ECON 351</td>
<td>Money and Banking</td>
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<td>FIN 409</td>
<td>Real Estate Finance and Investment</td>
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<td>FIN 420</td>
<td>Investment and Portfolio Analysis</td>
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<td>FIN 450</td>
<td>Retirement Planning</td>
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Academic Advising
The objectives of the university’s academic advising program are to help advisees identify and achieve their academic goals, to promote their intellectual discovery, and to encourage students to take advantage of both in-and out-of class educational opportunities in order that they become self-directed learners and decision makers.

Both advisers and advisees share responsibility for making the advising relationship succeed. By encouraging their advisees to become engaged in their education, to meet their educational goals, and to develop the habit of learning, advisers assume a significant educational role. The advisee’s unit of enrollment will provide each advisee with a primary academic adviser, the information need to plan the chosen program of study, and referrals to other specialized resources.

READ SENATE POLICY 32-00: ADVISING POLICY (http://senate.psu.edu/policies-and-rules-for-undergraduate-students/32-00-advising-policy)

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Career Paths
The certificate in Financial Services Sales can be pursued by students in most Black School of Business undergraduate degree programs or as a stand-alone credential for nondegree students. Penn State Behrend has a comprehensive support system to help you identify and achieve your goals for college and beyond. Meet with your academic adviser often and take advantage of the services offered by the Academic and Career Planning Center beginning in your first semester.

Careers
A certificate in Financial Services Sales demonstrates to prospective employers that you are knowledgeable about not only financial products and planning but also consumer behavior, personal marketing, and interpersonal communications.

MORE INFORMATION (http://behrend.psu.edu/school-of-business/academic-programs/certificate-programs/financial-services-sales)

Opportunities for Graduate Studies
Adding a certificate to your major degree program demonstrates to graduate school admissions committees your commitment to interdisciplinary thinking.

MORE INFORMATION (http://behrend.psu.edu/school-of-business/academic-programs/certificate-programs/financial-services-sales)

Professional Resources
AACSB International (http://www.aacsb.edu)

Contact
Erie
BLACK SCHOOL OF BUSINESS
281 Jack Burke Research and Economic Development Center
5101 Jordan Road
Erie, PA 16563
814-898-6107
behrend-business@psu.edu

http://behrend.psu.edu/school-of-business