



# Transfer Planning Worksheet 2025-2026



**NORTH CENTRAL  
COLLEGE 1861**

Student Name: \_\_\_\_\_ North Central ID# \_\_\_\_\_ College Representative: \_\_\_\_\_ Date: \_\_\_\_\_

## Finance, B.B.A.

Finance broadly emphasizes the study of financial instruments, institutions and markets. Graduates are employed in a wide variety of careers including financial analysis, financial advising, financial instrument investment and portfolio management and insurance. Finance professionals work for investment banking firms, private firms, governmental units and not-for-profit organizations.

The finance major requirements provide a substantial portion of the content coverage for the level 1 examination in the Chartered Financial Analyst (CFA) program. In addition to the required finance courses and common SBE core, students interested in obtaining the CFA designation are encouraged to complete additional finance, economics and accounting electives.

## Major Requirements

Course Name	Equivalent	Credit	Grade
SBEN 100 - Globalization and Society	BUS 141 @ TC		
ACCT 201 - Financial Accounting	ACC 101 @ TC		
ACCT 202 - Managerial Accounting	ACC 105 @ TC		
BUSN 205 - Business Law and Ethics	BUS 161 @ TC		
BUSN 265 - Business and Economics Statistics	BUS 149, ECO 170, or MAT 170 @ TC		
BUSN 485 - Business Strategy			
ECON 200 - Principles of Microeconomics	ECO 103 @ TC		
ECON 205 - Principles of Macroeconomics	ECO 102 @ TC		
FINA 350 - Corporate Finance	BUS 212 @ TC		
MGMT 305 - Management and Organizational Behavior	BUS 150 @ TC		
MKTG 300 - Principles of Marketing	BUS 127 @ TC		
<b>Finance Courses</b>			
Course Name	Equivalent	Credit	Grade
FINA 370 - Wealth Management			
FINA 400 - Investments and Portfolio Management			
FINA 426 - Securities Markets			
FINA 470 - Derivatives I: Markets and Applications			
<b>Electives</b>			
Eight additional credit hours, with at least four credit hours of FINA courses.			
Course Name	Equivalent	Credit	Grade
All FINA courses higher than FINA 350			
ACCT 317 - Intermediate Accounting I	ACC 251 @ TC		
ECON 365 - Econometrics			