This handbook provides the most basic and essential information relevant to every student in our Family Financial Planning program. The information in this handbook must be used in conjunction with the requirements and expectations set by each of the seven home institutions. For the most current information on our program, please visit the Family Financial Planning program webpage to learn more.

The Family Financial Planning program mission is to engage in the development of quality, ethical, financial counseling and planning professionals through graduate training based in the family and human sciences. Our graduate certificate and master’s degree distance programs are conducted entirely online, making it possible for students to complete a program at their convenience from virtually anywhere.

Seven participating universities operate as one cohesive program to offer graduate degrees and certifications in family financial planning and financial counseling. By combining our resources, we are able to provide a much deeper level of expertise in the wide-ranging field of financial planning.

Requirements vary slightly across institutions. The degree or certificate is issued by the home university, not Great Plains IDEA, and students need to follow all expectations set by their home university.

Degree and certificate titles vary by university, but the content is the same. Click on the university to learn more about that university’s requirements.

<table>
<thead>
<tr>
<th>Participating University</th>
<th>Master’s Degree</th>
<th>Financial Planning Graduate Certificate</th>
<th>Financial Counseling Graduate Certificate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Iowa State University</td>
<td>Master of Family and Consumer Sciences: Family Financial Planning</td>
<td>Family Financial Planning Certificate</td>
<td>ISU does not offer this certificate</td>
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<tr>
<td>Montana State University</td>
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<td>North Dakota State University</td>
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<td>Graduate Certificate in Financial Planning</td>
<td>Financial Counseling Certificate</td>
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<td>Oklahoma State University</td>
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<td>Financial &amp; Housing Counseling Certificate</td>
</tr>
<tr>
<td>University of Missouri</td>
<td>Master of Science in Personal Financial Planning</td>
<td>Personal Financial Planning Certificate</td>
<td>Financial &amp; Housing Counseling Certificate</td>
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<tr>
<td>University of Nebraska-Lincoln</td>
<td>Master of Science</td>
<td>Family Financial Planning Certificate</td>
<td>Financial &amp; Housing Counseling Certificate</td>
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</tbody>
</table>
Our core program learning outcomes are:

1. Construction of a professional, comprehensive financial plan.
2. Implementation of ethical standards in financial planning as prescribed by the CFP Board of Standards.
3. Demonstration of listening and counseling skills needed to help families with financial management.

In addition to these outcomes, family financial planning programs meet all the student-centered learning objectives set by the Certified Financial Planner Board of Standards as well as those set by the Association for Financial Counseling and Planning. To learn how to become a CFP® Professional visit the CFP Board. To learn how to become an Accredited Financial Counselor, visit the AFCPE site. Great Plains IDEA universities do not certify individuals to use the AFC® or CFP® marks. This certification is granted only by AFCPE and the CFP Board to those persons who, in addition to completing an educational requirement such as this program, have met its ethics, experience and examination requirements.

<table>
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<th></th>
<th>Hours</th>
<th>CFP</th>
<th>AFC</th>
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<tr>
<td>Financial Counseling Certificate</td>
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Your Home University

While courses are offered among the participating universities, students will choose one institution as their “home university”. The home university is where students initially apply for admission and (if admitted) receive support in order to complete the degree or certificate program. At the home university, students will:

- Be matched with a faculty member who serves as their major professor/advisor,
- Register for courses with the assistance of the home university’s GPIDEA Campus Coordinator,
- Be billed for tuition regardless of which GPIDEA partnering institution is teaching the course(s) they take, and
- Complete the program requirements in order to ultimately receive their degree or certificate. The degree or certificate is issued from the home university, not GPIDEA. Program requirements may vary slightly across institutions, and students are expected to follow all policies and procedures as set by their home university.
Program Requirements

Master’s Degree

The master’s degree in Family Financial Planning is a 36-credit post-baccalaureate program of study. To qualify for this degree, students must be admitted to the master’s degree program at one of the seven participating universities, complete the necessary coursework, and meet the master’s degree requirements of their home university.

Detailed course descriptions are located on the Great Plains IDEA website. Planning for courses can be done with the help of the interactive Course Planner and your University Contact. The program is very flexible. A sequential order of courses is recommended, but not required. However, it is helpful to take Fundamentals, Insurance, and Personal Income Tax early in the program and Financial Planning Case Studies (capstone course) near the end. Full-time students typically take nine (9) credits of coursework in a semester. If working full-time, the reasonable credit load is 3 to 6 credits.

Recommended Sequence for Coursework (24 credits - each course is 3 credits):

1. Fundamentals for Family Financial Planning -- Not required in all programs.
   a. Fundamentals should be taken by students who do not have a background in the field as well as students who are interested in sitting for AFC accreditation. Fundamentals should not be taken concurrently with other core courses.

- Insurance Planning for Families
- Personal Income Taxation
- Investing for the Family’s Future
- Retirement Planning, Employee Benefits and the Family
- Estate Planning for Families
- Case Studies (The above core courses must be completed prior to enrolling in Case Studies)
- Financial Theory and Research I (may be taken at any time)
- Financial Counseling (may be taken at any time)

Elective courses in the master’s in Family Financial Planning in recommended sequence (select any 12 credits - each course is 3 credits):

- Financial Theory and Research II
- Military Personal Finance
- Housing and Real Estate
- Family Financial Planning – Practicum (should be taken after core courses are completed)
- Professional Paper
- Professional Practices (should be taken after core courses are completed)
- Seminar (topics vary)
Graduate Certificates

The graduate certificate in Family Financial Planning is an 18-credit hour post-baccalaureate program of study designed for students who want coursework that meets the educational requirement to sit for the CFP® certification examination. Students must be admitted to the graduate certificate program at a participating university, complete the necessary coursework, and meet the graduate certificate requirements of their home university.

Required courses for the Certificate in Family Financial Planning (18 credits, each course is 3 credits)
- Estate Planning for Families
- Insurance Planning for Families
- Investing for the Family’s Future
- Personal Income Taxation
- Retirement Planning, Employee Benefits and the Family
- Financial Planning Case Studies

Course descriptions may be found on the Great Plains IDEA website and offerings in the coming semesters are found in the Course Planner.

The graduate certificate in Financial Counseling is an 18-credit hour post-baccalaureate program of study designed for students who want coursework that meets the educational requirement to sit for the AFC® certification examination. Students must be admitted to the graduate certificate program at a participating university, complete the necessary coursework, and meet the graduate certificate requirements of their home university. Course descriptions may be found on the Great Plains IDEA website and offerings in the coming semesters are found in the Course Planner.

Required courses for the Certificate in Financial Counseling (12 credits, each course is 3 credits)
- Financial Counseling
- Theories and Research in FFP I
- Housing and Real Estate
- Fundamentals of Financial Planning

Elective courses for the Certificate in Financial Counseling (6 credits required, each course is 3 credits)
- Retirement Planning, Employee Benefits, and the Family
- Personal Income Taxation
- Insurance Planning for Families
- Estate Planning for Families
- Investing for the Family’s Future
- Military Personal Financial Readiness
- Practicum
Who to Contact for Help

**Academic Advisor**

Your academic advisor is the faculty member/staff person there to help you as you make your academic decisions and as you progress through the program. You should consult your academic advisor for assistance with the following:

- Course planning and selection (including elective approval)
- Transfer credit questions
- Plan your internship/practicum work (if applicable)
- Help with research interests

Academic advisors are assigned by the home university after acceptance in the program.

**Campus Coordinator**

Campus Coordinators are available to help students navigate their home institution. Campus Coordinators are available at every institution to help with questions regarding courses taken from other teaching institutions. Coordinators serve as a first point of reference for general questions and the following information:

- Enrollment processes (contact your academic adviser for course selection)
- General policy information at your home university
- General Great Plains IDEA information and policies
- Assistance with the Learning Management System

A list of campus coordinators can be found on the [Family Financial Planning webpage](#) in the right sidebar titled “University Contacts.”
## Key for Course Titles and Numbers

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<th>Alliance #</th>
<th>Alliance Title</th>
<th>ISU #</th>
<th>MTSU #</th>
<th>NDSU #</th>
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<td>Estate Planning for Families</td>
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