MSFS  
MASTER OF SCIENCE IN FINANCIAL SERVICES  
WITH CONCENTRATIONS

**General**

**RESIDENCY I**  
GS 803 Financial Statements and Business  
Business Valuation Analysis  
GS 831 Ethics and Human Values  

**REQUIRED COURSES**  
GS 811 Security Analysis and Portfolio Management  
GS 814 Qualified Retirement Plans  
GS 815 Advanced Estate Planning  
GS 817 Personal Tax Planning  
GS 842 Executive Compensation  

**ELECTIVES (CHOOSE THREE)**  
GS 838 Business Succession Planning  
GS 839 Planning for Impact in the Context of Family Wealth (CAP® Course)  
GS 840 Building and Managing  
Financial Advisory Practice  
GS 849 Charitable Giving Strategies (CAP® Course)  
GS 859 Gift Planning in a Nonprofit Context (CAP® Course)

**RESIDENCY II**  
GS 807 MSFS Case Study Project  
GS 808 Issues in Advanced Retirement Planning

**Retirement Planning**

**RESIDENCY I**  
GS 803 Financial Statements and Business  
Business Valuation Analysis  
GS 831 Ethics and Human Values  

**REQUIRED COURSES (RICP®)**  
GS 811 Security Analysis and Portfolio Management  
GS 814 Qualified Retirement Plans  
GS 815 Advanced Estate Planning  
GS 817 Personal Tax Planning  
GS 842 Executive Compensation  

**RICP® COURSES**  
HS 353 Retirement Income Process, Strategies, and Solutions  
HS 354 Sources of Retirement Income  
HS 355 Managing the Retirement Income Plan

**RESIDENCY II**  
GS 807 MSFS Case Study Project  
GS 808 Issues in Advanced Retirement Planning

**Legacy Planning**

**PRE-REQUISITE**  
GS 839 Planning for Impact in the Context of Family Wealth (CAP® Course)

**RESIDENCY I**  
GS 869 Legacy Planning Reimagined  
GS 831 Ethics and Human Values  

**REQUIRED COURSES**  
GS 815 Advanced Estate Planning  
GS 817 Personal Tax Planning  
GS 838 Business Succession Planning

**CAP® COURSES**  
GS 849 Charitable Giving Strategies  
GS 859 Gift Planning in a Nonprofit Context

**RICP® COURSES**  
HS 353 Retirement Income Process, Strategies, and Solutions  
HS 354 Sources of Retirement Income  
HS 355 Managing the Retirement Plan

**RESIDENCY II**  
GS 807 MSFS Case Study Project  
GS 808 Issues in Advanced Retirement Planning

**NOTE:** The RICP® courses transfer into the Graduate School upon completion of GS 808 with a B or better.