

CAMPBELL UNIVERSITY



Lundy-Fetterman School of Business

Trust and Investment Management

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For more information about the program contact:

The Administrative Assistant

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The Campbell Program

Trust and Investment Management offers a wide diversity of career opportunities, and we have three unique programs to meet your needs:

- You may earn a four-year Bachelor of Business Administration (BBA) degree with a major in Trust and Investment Management;
- You might pursue our relatively new four-year Pre-Law Track, which overlays most Trust and Investment Management courses with classes specially selected to enhance skills needed for law school; or,
- You could enter our 3/2 program, which enables you to earn both a BBA and an MBA degree in a five-year time span.

Whatever your choice, you'll be part of a nationally known and respected department. Graduates are qualified to sit for the CFP® examination administered by the IBCFP and earn the CFP® designation. This gives the graduate the additional option of pursuing a career as a financial planner. *

The Campbell Approach

We use a variety of teaching strategies in major courses averaging only about 50 students each. These include cases studies, role-playing, and internship experiences.

The internships are optional, but most of our students complete a summer internship. We have ongoing internship arrangements with numerous major financial institutions nationwide and we will work hard to match you with a suitable opportunity.

The Campbell Faculty

Three faculty members specialize in trust management and financial planning; two hold law degrees, the third has a doctorate in finance. In addition to being recognized for their teaching and research excellence, they have years of practical financial experience.

All trust-related courses are taught by these teachers; you won't have any graduate assistants. Faculty members will also be readily accessible to you.

The Campbell Resources

Because it's the only undergraduate program of its kind, our students enjoy several special resources. For example, the Gilbert T. Stephenson Trust Library is among the best collections of trust and financial planning literature in the U.S. Our majors also participate annually in the

Campbell University-Kenelm Foundation Wealth Managers Forum Seminar and the Trust Advisors Forum. Moreover, Campbell sponsors The Southeastern Trust School each summer on campus. Our commitment to providing quality continuing education programs to senior executives has resulted in over 90% of our seniors being placed upon graduation.

In addition, our students benefit from both the Gilbert T. Stephenson Trust Club and the Accounting and Financial Planning Club, which arrange speakers, social activities, and community projects.

The Campbell Student

We seek students from various backgrounds who are prepared to complete rigorous courses from several specialties. Strong analytical and communication skills are useful.

About one-half of our majors pursue either an MBA or law degree; virtually all are accepted by their first-choice school.

The remainder immediately seek positions with bank trust departments, private banking, securities firms, insurance companies, commercial banks, financial planning firms, and regulatory agencies. Those entering bank trust departments work in the areas of personal trust, corporate trust, employee benefits, investments, and operations.

The Trust Program has ongoing relationships with Bank of

The Campbell Advantage

The quality of the Campbell experience is evident both in our exceptional job placement rates and in measures such as the Certified Financial Planner (CFP) exam.

Consequently, as a Campbell trust management major, you'll find:

- A one-of-a-kind program flexible enough to match your goals at the undergraduate level ...
- A marketable degree from an institution with a proven track record for opening a huge selection of financial doors; and ...
- A distinctive dedication to quality liberal arts education, free enterprise, and our Christian Mission.

Trust and Investment Management at Campbell is the education you need... the education you want... the education for your life.

* Certified Financial Planner Board of Standards, Inc. owns the marks CFP®, CERTIFIED FINANCIAL PLANNER™, and CFP (with flame logo)® which it awards to individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

America, Wachovia, BB&T, Mellon, First Citizens Bank, Merrill Lynch, National City Bank, and Suntrust. Trust majors have the opportunity to participate in internship with the above institutions in New York, Seattle, Miami, Dallas, Los Angeles, Atlanta, or Pittsburgh just to name a few locations.

The Campbell Financial Opportunities

We established the Trust Education Foundation in 1971 to ensure, among other things, that students with high academic achievement and financial need could receive scholarship funding. Only trust management majors have access to these funds. Majors are also eligible to compete for many other business-related endowment scholarships.

Trust Management and Investment Management: Bachelor of Business Administration

Requirements for a Major in Trust Management and Financial Planning (BBA)

Accounting 213, 214, 333; Business Administration 221, 222, 314, 300, 314, 320, 331, 336, 433, 435, 530, 531, 533, 535; Computer Information Systems 125; Economics 201, 202, 453; Trust Management 330, 400, 410, 411, 415, 420, 432, 435, 436, 438, 470. In order to receive the Trust Certificate, Trust Management graduates must earn a minimum overall grade point average of 2.50.

Interested?

Call us today and ask for your informational materials about Campbell's:

Academics
Advantages
Campus Visits
Career Services
Community
"Creek" Life
Financial Aid
International Admissions
Outcomes
Residence Life
Value

Admissions Office
Campbell University
1-800-334-4111

International: 01-910-893-1415
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Consider us. Visit us. Call us today.

Curriculum Outline

Trust and Investment Management

CAMPBELL

UNIVERSITY

Freshman Year

SEMESTER 1			SEMESTER 2		
		HRS			HRS
ENGLISH COMPOSITION ②	ENGL 101	3	ENGLISH COMPOSITION①	ENGL 102	3
WESTERN CIVILIZATION I	HIST 111	3	WESTERN CIVILIZATION II	HIST 112	3
SCIENCE ELECTIVE		4	STATISTICS	MATH 160	3
ALGEBRA	MATH 111	3	SCIENCE ELECTIVE		4
LIFETIME WELLNESS	PE 185	2	FINE ARTS (MUSIC; ART; DRAMA)	131	3
FOREIGN LANGUAGE			EXERCISE ACTIVITY	PE 111	1
CU WORSHIP	CUW 100	0.5	CU WORSHIP	CUW 100	0.5
NEW STUDENT FORUM	BADM 100	1			

Meet foreign language requirements.

Sophomore Year

SEMESTER 3			SEMESTER 4		
		HRS			HRS
ENGLISH ELECTIVE ③	ENGL	3	ENGLISH ELECTIVE ③	ENGL	3
INTRO TO CHRISTIANITY	RELG 125	3	RELIGION ELECTIVE	RELG	3
MICRO ECONOMICS	ECON 201	3	MACRO ECONOMICS	ECON 202	3
ACCOUNTING	ACGT 213	3	PRIN OF ACCOUNTING II	ACGT 214	3
BUSINESS LAW	BADM 221	3	BUSINESS LAW II	BADM 222	3
CU WORSHIP	CUW 200	0.5	CU WORSHIP	CUW 200	0.5

Junior Year

SEMESTER 5			SEMESTER 6		
		HRS			HRS
FIDUCIARY PRINCIPLES	TRUS 330	3	FIDUCIARY LAW	TRUS 400	3
CORPORATE FINANCE	BADM 314	3	INTRO TO COMPUTERS	CIS 125	3
MONEY AND BANKING	ECON 453	3	BUS COMMUNICATION	BADM 336	3
INCOME TAX	ACGT 333	3	ESTATE TAX	TRUST 410	3
FINANCIAL PLANNING	BADM 320	3	PHILOSOPHY OF BUSINESS	BADM 300	3
PRINC OF MGMT	BADM 331	3	PSYCHOLOGY	PSYC 222	3

Senior Year

SEMESTER 7			SEMESTER 8		
		HRS			HRS
FIDUCIARY LAW	TRUS 420	3	ESTATE PLANNING	TRUS 432	3
INVESTMENTS	BADM 530	3	ADVANCED INVESTMENTS	BADM 531	3
PRIN INSURANCE	BADM 433	3	TRUST DEPT MANAGEMENT	TRUS 415	3
GIFT & FIDUC TAXES	TRUS 411	3	ESTATE ADMINISTRATION	TRUS 435	3
EMPLOYEE BENEFITS	TRUS 436	3	TRUST ADMINISTRATION	TRUS 438	3
PRINC OF REAL ESTATE	BADM 435	3	TRUST SALES & MARKET	TRUS 470	3

- ① English 100 may be waived for students with an SAT verbal score of 450 or higher.
- ② English 101 may be waived for students with an SAT verbal score of 700 or higher and a B average in high school English. Waiver requires formal approval from the English Department.
- ③ The Sophomore English requirements may be satisfied by completing any two of the following courses: English 201, 202, 203 or 204. One course in foreign literature may be substituted for one literature course. This may be either a course in the language or in English translation, provided it is approved in advanced by the student's advisor.