



TRUST AND WEALTH MANAGEMENT

LUNDY-FETTERMAN SCHOOL OF BUSINESS

TRUST AND WEALTH MANAGEMENT

1-800-334-4111 • WWW.CAMPBELL.EDU

THE CAMPBELL PROGRAM

Founded in 1968, Campbell offers the only undergraduate Trust and Wealth Management program in the country. Because Trust and Wealth Management provides a wide array of career opportunities for graduates, we have three unique programs to meet your specific needs:

- You may earn a four-year Bachelor of Business Administration (BBA) degree with a major in Trust and Wealth Management;
- You might pursue a four-year Pre-Law Track which overlays most Trust and Wealth 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 BBA and MBA degrees in just five years.

Whatever your choice, you will 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 the major courses which average only about 50 students each. These techniques include case 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 of these professors hold law degrees. In addition to being recognized for their teaching and research excellence, they have years of practical financial experience.

THE CAMPBELL RESOURCES

Because it is the only undergraduate program of its kind, our students enjoy several unique resources. For example, the Gilbert T. Stephenson Trust Library is among the best collections of trust and financial planning literature in the country. Our majors also participate annually in the Trust Advisors Forum. Moreover, Campbell sponsors The Southeastern Trust School each summer on campus. Our commitment to providing quality continuing

For more information about the program contact:
The Admissions and Retention Coordinator
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trustmgmt@campbell.edu

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 such as: Fiduciary Law, Wills and Estates, Investments and Employee Benefits. Strong analytical and communication skills are useful.

About three-fourths 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 America, BB&T, First Citizens Bank, JP Morgan Chase, PNC and Wells Fargo. Trust majors have the opportunity to participate in internships with the above institutions in New York, Seattle, Miami, Dallas, Los Angeles, Atlanta or Boston, among many other locations.



Students enjoy Trust internships across the nation. In 2010, students were flown to New York City for a Bank of America intern welcome and training session.

* CFP™, Certified Financial Planner™ are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

THE CAMPBELL FINANCIAL OPPORTUNITIES

The Lundy-Fetterman School of Business 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 and Trust Pre-Law majors have access to these funds. Majors are also eligible to apply for other Lundy-Fetterman School of Business Endowment Scholarships.

BBA IN TRUST AND WEALTH MANAGEMENT

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

ACCT 213, 214, 333; BADM 100, 125, 221, 222, 314, 300, 331, 336, 433, 435; ECON 201, 202, 453; TRST MGMT 330, 360, 400, 410, 411, 415, 420, 432, 434, 436, 439, 440, 470.

In order to receive the Trust Certificate, Trust Management graduates must earn a minimum overall grade point average of 2.50.

CURRICULUM OUTLINE

Trust and Wealth Management

FRESHMAN YEAR

| SEMESTER 1 | | | SEMESTER 2 | | |
|--------------------------|----------|-----|--------------------------|----------|-----|
| | | HRS | | | HRS |
| ENGLISH COMP I | ENGL 101 | 3 | ENGLISH COMP II | ENGL 102 | 3 |
| SCIENCE (W/LAB) ELECTIVE | | 4 | WESTERN CIVILIZATION II | HIST 112 | 3 |
| COLLEGE ALGEBRA | MATH 111 | 3 | STATISTICS | MATH 160 | 3 |
| WESTERN CIVILIZATION I | HIST 111 | 3 | SCIENCE (W/LAB) ELECTIVE | | 4 |
| LIFETIME WELLNESS | PE 185 | 2 | ART/MUSIC/THEATRE | 131 | 3 |
| NEW STUDENT FORUM | BADM 100 | 1 | PE ACTIVITY | PE 111 | 1 |
| CU WORSHIP | CUW 100 | 0.5 | CU WORSHIP | CUW 100 | 0.5 |

SOPHOMORE YEAR

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

JUNIOR YEAR

| SEMESTER 5 | | | SEMESTER 6 | | |
|----------------------|----------|-----|--------------------|----------|-----|
| | | HRS | | | HRS |
| INCOME TAX | ACCT 333 | 3 | FIDUCIARY LAW I | TRST 400 | 3 |
| CORPORATE FINANCE | BADM 314 | 3 | ESTATE TAX | TRST 410 | 3 |
| PRIN OF MANAGEMENT | BADM 331 | 3 | BUS INFO TECH | BADM 125 | 3 |
| FIDUCIARY PRINCIPLES | TRST 330 | 3 | PHIL OF BUSINESS | BADM 300 | 3 |
| FINANCIAL PLANNING | TRST 360 | 3 | BUSINESS COMM | BADM 336 | 3 |
| MONEY & BANKING | ECON 453 | 3 | GENERAL PSYCHOLOGY | PSYC 222 | 3 |

SENIOR YEAR

| SEMESTER 7 | | | SEMESTER 8 | | |
|-------------------|----------|-----|-----------------------|----------|-----|
| | | HRS | | | HRS |
| GIFT & FID TAX | TRST 411 | 3 | TRUST DEPT MANAGEMENT | TRST 415 | 3 |
| FIDUCIARY LAW II | TRST 420 | 3 | ESTATE PLANNING | TRST 432 | 3 |
| EMPLOYEE BENEFITS | TRST 436 | 3 | TRUST & ESTATE ADMIN | TRST 434 | 3 |
| INTRO INVESTMENTS | TRST 439 | 3 | ADV INVESTMENTS | TRST 440 | 3 |
| PRIN OF INSURANCE | BADM 433 | 3 | TRUST SALES & MARKET | TRST 470 | 3 |
| REAL ESTATE | BADM 435 | 3 | | | |

TOTAL HOURS 134

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 will 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.
- A distinctive dedication to a quality liberal arts education, free enterprise and our Christian Mission.

English Comp – Students with an SAT verbal score below 450 will be enrolled in ENGL 100; 450-699 students will be enrolled in ENGL 101; 700 and above with at least a “B” average in high school students will be enrolled in ENGL 102.

English Literature – The ENGL LIT requirement may be satisfied by completing any two of the following literature courses: ENGL 201, 202, 203, 204 or 205, or with a 300-level Foreign LANG LIT.

Science Elective – Can be chosen from any 4-hour science courses with a lab.

The major requirements outlined within this brochure are intended as a guideline and the curriculum outlines are only a sample. The most recent copy of the University's Undergraduate Studies Bulletin is the official source related to curriculum guidelines. It is the student's responsibility to consult with his/her academic adviser.