

Business Administration

Course Number:	BUAD 235
Course Title:	WEALTH MANAGEMENT AND ESTATE PLANNING
Credits:	3
Calendar Description:	This course examines market indicators in relation to wealth management and estate planning and progresses to an understanding of investment products. Investment planning, cash and debt management and estate planning are also explored.
Semester and Year:	Winter 2015
Prerequisite(s):	BUAD 251; MATH 114
Corequisite(s):	No
Prerequisite to:	No
Final Exam:	Yes
Hours per week:	3
Graduation Requirement:	Required – Financial Services option
Substitutable Courses:	Students with credit for BUAD 253 or BUAD 254 cannot take BUAD 235 for furth4 430.08444BDC nd(w)1. f

Evaluation Procedure

Term Work	20%
Mid-term Exam	30%
Final Exam	50%
Total	100%

Notes

Certified Financial Planner License:

The Financial Planning Standards Council oversees the granting of the Certified Financial Planner license. This course qualifies for educational credit with Advocis. Students who wish to write the exams for the CFP license must complete a se.oete3(s)-1.9(e.)-6.62(i)2.6(si)2.7(c)(s)-2(5S0C43 0 T

SKILLS ACROSS THE BUSINESS CURRICULUM

The Okanagan School of Business promotes core skills across the curriculum. These skills include reading, written and oral communications, computers, small business, and academic standards of ethics, honesty and integrity.

STUDENT CONDUCT AND ACADEMIC HONESTY

What is the Disruption of Instructional Activities?

At Okanagan College (OC), disruption of instructional activities includes student “conduct which interferes with examinations, lectures, seminars, tutorials, group meetings, other related activities, and with students using the study facilities of OC”, as well as conduct that leads to property damage, assault, discrimination, harassment and fraud. Penalties for disruption of instructional activities include a range of sanctions from a warning and/or a failing grade on an assignment, examination or course to suspension from OC.

What is Cheating?