

Business Administration

Course Number: **BUAD 356**

Course Title: **CONTEMPORARY PRACTICES IN FINANCIAL PLANNING**

Credits: 3

Evaluation Procedure

| | |
|-----------------------------------|------|
| Term Work (Quizzes & Assignments) | 20% |
| Mid-term Exam | 30% |
| Final Exam | 50% |
| Total | 100% |

Notes

A financial calculator is mandatory in the courses in the Financial Services option. Students are expected to be proficient in the use of their financial calculator. The Texas Instruments BAII+ is recommended.

The Financial Planning Standards Council oversees the granting of the Certified Financial Planner license. The license is achieved by a combination of education, exam, and work experience. Students who wish to write the first of two license exams (FPE1) must complete this course as well as the three others in the accredited curriculum and pass a comprehensive final exam administered by Advocis. Okanagan College students who have successfully taken all of BUAD 251, MATH 114, BUAD 209 and BUAD 195 are granted an exemption from Advocis course 1 Financial Planning Fundamentals provided that they achieve a final grade of 60% or better in each course.

Required Texts/Resources

Contemporary Practices in Financial Planning, CCH Publishers. CFP Education Program
Course 2 – **13th Edition 2016**

Course Schedule

| Date | | Topic | Textbook |
|----------|----|--|------------------------|
| Week of: | | Tue. Sep. 6 - College-wide orientation day Wed. Sep. 7 - Classes begin Mon. Oct. 10 - Thanksgiving Day (no classes) Fri. Nov. 11 - Remembrance Day (no classes) Tues. Dec. 6 - Last day of regularly-scheduled classes | |
| Sept | 4 | Introduction / Financial Planning Process | |
| | 11 | Financial Planning Process Financial Services Industry and Regulations | M8 Unit 3 M8 Unit 1 |
| | 18 | Consumer Protection Professional Standards / Code of Conduct | M8 Unit 2 M8 Unit 4 |
| | 25 | Tax I – Selected Topics | |

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.