1-27-2006

SR-05-06-(10) 55-112 CC

Marshall University

CURRICULUM COMMITTEE RECOMMENDATION

SR-05-06-(10) 55-112 CC

Recommends approval of the listed **COURSE ADDITIONS** in the **ELIZABETH McDOWELL LEWIS COLLEGE OF BUSINESS:**

FIN 451/551 Financial Planning Applications 3 hours
This course includes client interactions, time value of money, personal financial statements, cash flow and debt management, asset acquisition, overview of risk management, investment planning, business ethics, and retirement planning. Prerequisite(s): ECN 250, 253; ACC 216; MGT 218.

FIN 452/552 Investment Planning 3 hours
This course provides the student with understanding of the various types of securities traded in financial markets, investment theory and practice, portfolio construction and management, and investment strategies and tactics. Prerequisite(s): FIN 451

FIN 454/554 Insurance Planning 3 hours
This course introduces risk management and insurance decisions. Topics include insurance for life, health, disability, property and liability risks, as well as annuities, group insurance, and long term care. Prerequisite(s): LE 207, FIN 451

FIN 456/556 Income Tax Planning 3 hours
This course focuses of principles and current law and practice of income taxation and its impact on financial planning for individuals, couples and families as investors, employees and business owners. Prerequisite(s): FIN 451

FIN 458/558 Estate Planning 3 hours
Estate Planning focuses on the efficient conservation and transfer of wealth, consistent with the client's goals such as trusts, wills, probate, advanced directives, charitable giving, wealth transfers and related taxes. Prerequisite(s): FIN 451, 454, 456

FIN 460/560 Retirement Planning 3 hours
The retirement planning course is to provide individuals with knowledge of retirement plans such as Social Security, Medicare, Medicaid, defined benefit and defined contribution plans and their regulatory provisions. Prerequisite(s): FIN 451

RATIONALE:

Each course is an appropriate addition to the respective program.

FACULTY SENATE CHAIR:

APPROVED BY THE FACULTY SENATE: Larry Stickler DATE: 1/27/2006

DISAPPROVED BY THE
FACUTY SENATE: ______________________ DATE: __________

UNIVERSITY PRESIDENT:

APPROVED: ______________________ DATE: 1/31/06

DISAPPROVED: ______________________ DATE: __________

COMMENTS: ______________________