1-27-2006

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

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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
DISAPPROVED BY THE
FACUTY SENATE: ___________________________ DATE: ___________________________

UNIVERSITY PRESIDENT: ___________________________

APPROVED: ___________________________ DATE: 1/31/06

DISAPPROVED: ___________________________ DATE: ___________________________

COMMENTS: __________________________________________

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