Business Administration

Course Number:	**BUAD 234**
Course Title:	**RETIREMENT INCOME PLANNING**
Credits:	3
Calendar Description:	Learners examine the issues related to retirement planning. Topics include options in financing retirement, retirement needs analysis, products, issues and practices in the area of retirement. Professional and ethical responsibilities of financial planners are explored.
Semester and Year:	**Winter 2020**
Prerequisite(s):	BUAD 251, MATH 114
Corequisite(s):	No
Prerequisite to:	No
Final Exam:	Yes
Hours per week:	3
Graduation Requirement:	Elective Financial Services option
Substitutable Courses:	Students with credit for BUAD 252 or BUAD 254 cannot take BUAD 234 for further credit.
Transfer Credit:	
Special Notes:	This course is recognized by Advocis as satisfying one element of the educational requirements which must be met in order to write the FPE1 exam, the first of two required to obtain licensing as a CFP.
Originally Developed:	November 2012
EDCO Approval:	March 2018

Professors

Steve Watson	Cell: 250-718-3022	Kelowna: C103

Course Schedule

2020 Week of		Monday, January 6 First Day of Classes Monday, February 17 Family Day Tuesday, February 18 Friday, February 21 Reading Break Thursday, April 9 Last Day of Regular Classes	
Jan	6	Introduction / CFP Pathway Financial Services Industry	Handout / Website resources
	13	FP Canada Code of Ethics FP Process / Retirement Needs Analysis	Handout
	20	Retirement Needs Analysis - Applications Consumer Protection	Handout