

# Business Administration

Course Number: **BUAD 251**

**Professors**

Name	Phone number	Office	Email
<i>Course Captain</i>	250-762-5445 ext.	Online	rryan@okanagan.bc.ca

**Learning Outcomes**

Upon completion of this course students will be able to:

- draft a financial plan and set financial goals.
- compile a budget, and personal financial statements and keep records to monitor progress toward financial goals.
- evaluate different banking options and know how to manage credit including home and automobile financing.
- describe the use of whole life and term life insurance.
- evaluate the different insurance coverage available for disability, health, home, tenant and automobile insurance.
- describe the different investment products (stocks, bonds, mutual funds), and utilize different investment products to create a diversified portfolio.
- explain basic tax minimization strategies.
- discuss the options for retirement planning including government pensions, employer retirement plans and individual savings plans.
- analyze the need for wills, powers of attorney and representation letters in an estate plan.

**Course Objectives**

This course will cover the following content:

The financial planning process including goal setting

**Evaluation Procedure**

Term Work	30%
Mid-term Exam	30%
Final Exam (cumulative)	40%
Total	100%

**Notes****Calculator**

Students will require a financial calculator for this course. The Texas Instruments BA-II Plus is strongly recommended, but any brand or model of non-programmable financial calculator, which can perform time-value-of-money calculations, is acceptable.

**Required Texts/Resources**

Personal Finance - Kapoor, Dlabay, Hughes, Ahmad - 7th Canadian Edition



## **SKILLS ACROSS THE BUSINESS CURRICULUM**

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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.