

# Business Administration

Course Number:	BUAD 251
Course Title:	PERSONAL FINANCIAL PLANNING
Credits:	3
Calendar Description:	This course introduces the tools and strategies of personal financial planning. Topics include goal setting, savings, investments, insurance, taxation, budgeting and financing. (also offered by Distance Education)
Semester and Year:	Winter 2017
Prerequisite(s):	No
Corequisite(s):	No
Prerequisite to:	BUAD 233, 234, 235, 356
Final Exam:	Yes
Hours per week:	3
Graduation Requirement:	Required –



BUAD

## Course Schedule

Date		Topic	Textbook
Week of:		Tues. Jan 3- Classes begin Family Day Feb 13 Reading Break Feb 14 to 17– no classes Mon. Apr 10 Last day of regularly scheduled classes Good Fri. Apr 14 & Easter Mon. Apr 17 – no exams	
Jan	2	Introduction to Personal Financial Planning	Ch 1
	9	Budgeting and Cash Management	Ch 2
	16	The basics of personal income tax	Ch.3
	23	Financial Institutions	Ch.4
	30	Fundamentals of Investing	Ch 10
Feb	6	Managing Credit	Ch. 5 & 6
	13	READING BREAK (Feb 13 to 17 – no classes)	
	20	Mid-term Exam (Chapters 1, 2, 3, 4, 5, 6, 10 ) and Major Purchases – Cars / Homes	Ch 7
	27	Home and Auto Insurance	Ch. 8
Mar	6	Managing Risk with Insurance Products	Ch. 9
	13	Investing in Stocks and Bonds	Ch 11 & 12
	20	Investing in Mutual Funds	Ch 13
Mar	27	Retirement Planning	Ch 14
Apr	3	Estate Planning	Ch 15
Apr	12 - 26	Final Exam Period ( Friday Apr 14 and Monday Apr 17 no exams )	

## 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.

## STUDENT CONDUCT AND ACADEMIC HONESTY

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