

# Business Administration

Course Number:	<b>BUAD 251</b>
Course Title:	<b>PERSONAL FINANCIAL PLANNING</b>
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. <i>(also offered by Distance Education)</i>
Semester and Year:	<b>Winter 2018</b>
Prerequisite(s):	No
Corequisite(s):	No
Prerequisite to:	BUAD 233, 234, 235, 356
Final Exam:	Yes
Hours per week:	3
Graduation Requirement:	Required – BBA & Diploma, Financial Services option
Substitutable Courses:	

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**Professors**

<b>Name</b>	<b>Phone number</b>	<b>Office</b>	<b>Email</b>
<b>Steve Watson</b> <i>Course Captain</i>	250-718-3022	Kelowna: C103	

**Evaluation Procedure**

Course Schedule

Date		Topic	Textbook
Week of:		Wednesday Jan 3 Classes Begin Monday Feb 12 Family Day – <i>no classes</i> Tuesday Feb 13 to Feb 16 Mid-semester Study Break – <i>no classes</i> Friday Mar 30 to Monday April 2 Easter – <i>no classes</i> Thursday Apr 12 Last Day of Regularly-scheduled Classes	
Jan	1	Introduction to Personal Financial Planning	Ch 1
	8	Budgeting and Cash Management	Ch 2
	15	The Basics of Personal Income Tax	Ch 3
	22	Financial Institutions	Ch 4
	29	Fundamentals of Investing	Ch 10
Feb	5	Managing Credit	Ch 5 & 6
	12	READING BREAK ( <i>Feb 12 to 16 no classes</i> )	
	19	Mid-term Exam (Chapters 1, 2, 3, 4, 5, 6, 10 )	
	26	Major Purchases – Cars / Homes	Ch 7
Mar	5	Managing Risk with Insurance Products	Ch 8 & 9
	12	Investing in Stocks and Bonds	Ch 11 & 12
	19	Investing in Mutual Funds	Ch 13
	26	Retirement Planning	Ch 14
Apr	2	Estate Planning	Ch 15
	9	Team Presentations	
	16-26	Final Exam Period	

## **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