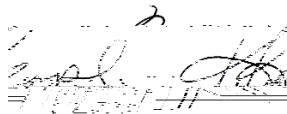


Business Administration

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. <i>(also offered by Distance Education)</i>
Semester and Year:	FALL 2021
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:	No
Transfer Credit:	CFP Personal Financial Planning
Special Notes:	No
Originally Developed:	November 2012
EDCO Approval:	November 2013



Handwritten signature and date: *[Signature]*
11/11/13

Professors

Name	Phone number	Office	Email
Drew McGillivray <i>Course Captain</i>	250-762-5445 Ext. 4793	K: C107	dmcgillivray@okanagan.bc.ca

Learning Outcomes

Course Schedule

2021		Classes Start: Wednesday, September 8 STAT Thursday, September 30 STAT Monday, October 11 STAT Thursday, November 11 & 12 Last day of regularly scheduled Classes: Monday, December 6	
Sep	10	Personal Financial Planning: An Introduction Financial Statements and Budgeting	Ch.1 Ch.2
	17	Financial Statements and Budgeting Planning Your Tax Strategy	Ch. 2 Ch. 3
	24	The Banking Services of Financial Institutions Introduction to Consumer Credit	Ch. 4 Ch. 5
Oct	1	Introduction to Consumer Credit The Cost of Credit Alternatives	Ch. 5 Ch. 6
	8	The Cost of Credit Alternatives The Finances of Housing	Ch. 6 Ch. 7
	15	Mid-term Exam (Chapters 1-7)	
	22	Home and Automobile Insurance Life, Health and Disability Insurance	Ch. 8 Ch. 9
	29	Life, Health and Disability Insurance Fundamentals of Investing	Ch. 9 Ch. 10
Nov	5	Fundamentals of Investing Investing in Stocks	Ch. 10 Ch. 11
	12	No class	
	19	Investing in Stocks Investing in Bonds	Ch. 11 Ch. 12
	26	Investing in Mutual Funds Retirement Planning	Ch. 13 Ch. 14
Dec	3	Estate Planning	Ch. 15
	8-18	Final Exam (Chapters 1-15)	

SKILLS ACROSS THE BUSINESS CURRICULUM

The Okanagan School of Business promotes core skills across the curriculum. These skills include reading, written and oral