

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

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

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
