

Business Administration

Course Number:	BUAD 234
Course Title:	RETIREMENT INCOME PLANNING
Credits:	3
Calendar Description:	Learners examine the issues related to retirement planning. Topics include options in financing retirement, retirement needs analysis, products, issues and practices in the area of retirement. Professional and ethical responsibilities of financial planners are explored.
Semester and Year:	WINTER 2023
Prerequisite(s):	BUAD 251, MATH 114
Corequisite(s):	No
Prerequisite to:	No
Final Exam:	Yes
Hours per week:	3
Graduation Requirement:	Elective – Financial Services option
Substitutable Courses:	Students with credit for BUAD 252 or BUAD 254 cannot take BUAD 234 for further credit.
Transfer Credit:	



Professors

Name	Phone number	Office	Email
Steve Watson <i>Course Captain</i>		Kelowna C103	swatson@okanagan.bc.ca

Learning Outcomes

Upon completion of this course students will be able to

- explain and apply the professional and ethical responsibilities associated with the role of financial planner.
- explain the regulatory environment in which the industry operates.
- explain and apply an in-depth working knowledge of various pension schemes, including topics such as plan design, benefit calculations, contribution rules and formulas, and tax deductibility.
- explain and apply an in-depth working knowledge of the principles of Registered Retirement Savings Plan contribution limits, contribution room, carry-forward

Course Schedule

2023 Week of	Monday January 9th, First day of class Monday February 20th, Statutory Holiday (no classes) February 21st thru 24th, Reading Week (no classes) Friday April 7th and Monday April 10th, Statutory Holidays (no classes) Friday April 14th, Last day of class	
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SKILLS ACROSS THE BUSINESS CURRICULUM

The Okanagan School of Business promotes core skills across