

FIN 2200 Financial Planning Syllabus Fall 2024

Text Book: *Personal Finance Turning Money into Wealth* 7th Edition By Arthur Keown, Publisher: Pearson

Office Hours: By appointment Phone Conference.

Course Description: Introductory course to Financial Planning. Topics: compound growth, risk & return, the financial planning process, federal taxes, life insurance, portfolio allocation, mutual fund, bond and stock investments. Students assemble properly allocated, broadly diversified portfolios invested in mutual funds and individual bonds. For the final project students present financial plans for model clients.

Lesson Plan:

<u>Week</u>	<u>Chapter</u>	<u>Topics</u>
Aug 19 th , 2024	1	Time Value of Money
Aug 26 th , 2024	2	Financial Statements; Goal Assignment Due (20 pts.)
Sep 2 nd , 2024	3	Financial Planning Process; Financial Statements Due (40 pts.)
Sep 9 th , 2024	4	Tax Planning; Quiz 1: Financial Planning Due (100 pts.)
Sep 16 th , 2024	5	Cash Accounts & CDs; Tax Credit (20 pts.) & Savings Comp (40 pts.) Due
Sep 23 rd , 2024	8	Insurance; Quiz 2: Taxes Due (100 pts.)
Sep 30 th , 2024	9	Investments & Allocations; Insurance Assignment Due (30 pts.)
Oct 7 th , 2024	11	Mutual Funds; Module 3 Quiz & IPQ Assignment Due (20 pts.)
Oct 14 th , 2024	14	Bonds; Mutual Fund Due (100 pts.)
Oct 21 st , 2024	13	Stocks; Allocated Portfolio Due (50 pts.)
Oct 28 th , 2024	12	Options; Financial Plan I Due (100 pts.)
Nov 4 th , 2024	15	Retirement Accounts; Duration Calculator Due (50 pts.)
Nov 11 th , 2024	16	Estate Planning; Bond Ladder Assignment Due (100 pts.)
Nov 18 th , 2024	17	Life Events; Quiz 4: Investments Due (265 pts.)
Nov 25 th , 2024		Customer Service; Quiz 5: Retirement Savings Due (70 pts.)
Dec 2 nd , 2024		Final Exam; Financial Plan II Due (200 pts.)

Grading Scale: 93+ A; 90-92.9 A-; 87-89.9 B+; 83-86.9 B; 80-82.9 B-; 77-79.9 C+; 73-76.9 C; 70-72.9 C-; 67-69.9 D+
63-66.9 D; 60-62.9 D-; <60 E

Grade Breakdown (total 1700 points):

Assignments (470 points) 27.6%

Attendance (0 points) 0%

Quizzes (600 points) 35.3%

Financial Plans (400 points) 23.5%

Final Exam (230 points) 13.5%

Course Student Learning Outcomes mapped to [SLCC College-Wide & General Education Student Learning Outcomes](#).

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|------------------------------------|---|
| 1. Acquire substantive knowledge | 5. Become a community engaged learner |
| 2. Communicate effectively | 6. Work in a professional & constructive manner |
| 3. Develop quantitative literacies | 7. Develop computer & information literacy |
| 4. Think critically & creatively | 8. Develop lifelong wellness |

Course Learning Outcomes	SLCC CWSLO #
Explain the financial planning process.	1, 2
Identify, describe and analyze various investment vehicles.	1, 2, 3, 4, 7
Research and analyze mutual fund performance.	1, 2, 3, 4, 6, 7
Collaborate in making investment recommendations.	1, 2, 3, 4, 5, 6, 7
Communicate using appropriate investing terminology.	1, 2, 6
Evaluate the risk profile of different asset classes and individual securities.	1, 3, 4, 7
Implement portfolio management concepts.	1, 2, 3, 4, 6
Research and assemble a bond ladder.	1, 2, 3, 4, 6, 7
Research and analyze life insurance.	1, 2, 4, 7
Evaluate the impact of taxes on investments	1, 2, 3, 4, 7

See [SLCC Assessment webpage](#) for additional details about College-Wide Student Learning Outcomes

Important Information for Students

General Education regardless of your major, General Education courses build a foundation of

broad knowledge and skills that help you in your further career and life.

<http://www.slcc.edu/gened>

SLCC's Learning Outcomes:

Students communicate effectively. This includes developing critical literacies—reading, writing, speaking, listening, visual understanding—that they can apply in various contexts; organizing and presenting ideas and information visually, orally, and in writing according to standard usage; understanding and using the elements of effective communication in interpersonal, small group, and mass settings.

Students develop quantitative literacies necessary for their chosen field of study. This includes approaching practical problems by choosing and applying appropriate mathematical techniques; using information represented as data, graphs, tables, and schematics in a variety of disciplines; applying mathematical theory, concepts, and methods of inquiry appropriate to program-specific problems.

Students think critically and creatively. This includes reasoning effectively from available evidence; demonstrating effective problem solving; engaging in creative thinking, expression, and application; engaging in reflective thinking and expression; demonstrating higher-order skills such as analysis, synthesis, and evaluation; making connections across disciplines; applying scientific methods to the inquiry process.

Students develop civic literacy and the capacity to be community-engaged learners who act in mutually beneficial ways with community partners. This includes producing learning artifacts indicating understanding of the political, historical, economic or sociological aspects of social change and continuity; thinking critically about—and weighing the evidence surrounding—issues important to local, national, or global communities; participating in a broad range of community-engagement and/or service-learning courses for community building and an enhanced academic experience.

Students develop the knowledge and skills to work with others in a professional and constructive manner. This includes engaging with a diverse set of others to produce professional work; interacting competently across cultures; understanding and appreciating human differences; understanding and acting on standards of professionalism and civility, including the SLCC Student Code of Conduct.

Students develop computer and information literacy. This includes using contemporary computer hardware and software to effectively complete college-level assignments; gathering and analyzing information using technology, library resources, and other modalities; understanding and acting upon ethical and security principles with respect to computer technology and to information acquisition and distribution; distinguishing between credible and non-credible sources of information, and using the former in their work in an appropriately documented fashion.

Students develop the attitudes and skills for lifelong wellness. This includes understanding the importance of physical activity and its connection to lifelong wellness; learning how participation in a fitness, sport or leisure activity results in daily benefits including stress reduction, endorphin release, and a sense of well-being.

ePortfolio Support Site for Students: <http://eportresource.weebly.com/learning-outcomes.html>