

Business Administration

Course Number:	BUAD 235
Course Title:	WEALTH MANAGEMENT AND ESTATE PLANNING
Credits:	3
Calendar Description:	This course examines market indicators in relation to wealth management and estate planning and progresses to an understanding of investment products. Investment planning, cash and debt management and estate planning are also explored.
Semester and Year:	Winter 201 6
Prerequisite(s):	BUAD 251; MATH 114
Corequisite(s):	No
Prerequisite to:	No
Final Exam:	Yes
Hours per week:	3
Graduation Requirement:	Required – Financial Services option

Evaluation Procedure

Term Work	20%
Mid-term Exam	30%
Final Exam	50%
Total	100%

Course Schedule

Date		Topic	Textbook
Week of:		Mon. Jan 4 Classes begin Family Day Feb 8 & Feb 9 to 12 Reading Break – no classes Good Fri. Mar 25 & Easter Mon. Mar 28 – no classes Tues. Apr 12 Last day of regularly scheduled classes	
Jan	4	Introduction - Financial Planning Concepts RESP	Module 18, Unit 1
	11	Debt Management Charitable Giving	Module 18, Unit 2 Module 18, Unit 3
	18	Introduction to Estate Planning / POA Estate & Wills	Module 19, Unit 1 Module 19, Unit 2
	25	Intestate Probate	Module 19, Unit 3 Module 19, Unit 4
Feb	1	Will Substitutes Executor - process	Module 19, Unit 5
	8 - 12	READING BREAK (<i>Feb 8 to 12 – no classes</i>)	
	15	Review Mid-term Exam (Feb 17) – M18 and M19	
	22	Return Mid-term Exam Macro Economics	Module 15,

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

What is the Disruption of Instructional Activities?

At Okanagan College (OC), disruption of instructional activities includes student “conduct which interferes with examinations, lectures, seminars, tutorials, group meetings, other related activities, and with students using the study facilities of OC”, as well as conduct that leads to property damage, assault, discrimination, harassment and fraud. Penalties for disruption of instructional activities include a range of sanctions from a warning and/or a failing grade on an assignment, examination or course to suspension from OC.

What is Cheating?

“Cheating includes but is not limited to dishonest or attempted dishonest conduct during tests or examinations in which the use is made of books, notes, diagrams or other aids excluding those authorized by the examiner. It includes communicating with others for the purpose of obtaining information, copying from the work of others and purposely exposing or conveying information to other students who are taking the test or examination.”

Students must submit independently written work. Students may not write joint or collaborative assignments with other students unless the instructor approves it in advance as a group/team project. Students who share their work with other students are equally involved in cheating.

What is Plagiarism?

Plagiarism is defined as “the presentation of another person’s work or ideas without proper or complete acknowledgement.” It is the serious academic offence of reproducing someone else’s work, including words, ideas and media, without permission for course credit towards a certificate, diploma, degree and/or professional designation. The defining characteristic is that the work is not yours.

“Intentional plagiarism is the deliberate presentation of another’s work or ideas as one’s own.” Intentional plagiarism can be a copy of material from a journal article, a book chapter, data from the Internet, another student, work submitted for credit in another course or (a)0.5(f)-139.2(nt)-1.1(e)-(e e)6.3()0.t.2(er)-6.35.t.2(er)-6.35.t.21(of -0.002 Tc h)-12.3(e)-em7tt(o)-12.2