

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:	WINTER 2024
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:	

Evaluation Procedure

Term Work	30%
Mid-term Exam	30%
Final Exam (cumulative)	40%
Total	100%

Notes**Calculator**

Students will require a financial calculator for this course. The Texas Instruments BA-II Plus is strongly recommended, but any brand or model of non-programmable financial calculator, which can perform time-value-of-money calculations, is acceptable.

Required Texts/Resources

Personal Finance -

Course Schedule

2024 Week starting Monday...		Monday January 8th, First day of class Monday February 19 th , Statutory Holiday (no classes) February 20 th thru 23 rd , Reading Week Friday March 29 th and Monday April 1 st , Statutory Holiday (no classes), Last day of classes: April 12.	
Jan.	8	Personal Financial Planning: An Introduction	1
	15	Financial Statements and Budgeting	2
		Planning your Tax Strategy	3
	22	Planning your Tax Strategy	3
		The Banking Services of Financial Institutions	4
	29	Introduction to Consumer Credit	5
	5	The Costs of Credit Alternatives	6
		The Finances of Housing	7
	12	The Finances of Housing & Midterm exam (Chs 1-7)	7
	19	Reading week – no classes	
	26	Home and Automobile Insurance	8
		Life, Health and Disability Insurance	9
	4	Fundamentals of Investing	10
		Investing in Stocks	11
	11	Investing in Bonds	12

