

**Note:**

**Course content may be changed, term to term, without notice. The information below is provided as a guide for course selection and is not binding in any form, and should not be used to purchase course materials.**

## ***COURSE SYLLABUS***

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### **BUSI 352**

#### **FINANCIAL AND RETIREMENT PLANNING**

#### **COURSE DESCRIPTION**

This course is designed to provide an overview of the financial planning process with specific emphasis on retirement planning. Topics discussed will include client/planner interactions; time value of money applications; personal financial statements development and assessment; cash flow and debt management; asset acquisition; education planning; planning elements of risk management; investment planning; and retirement planning; special needs planning review; integrating planning recommendations; financial planning ethics review; overview of practice management concepts.

#### **RATIONALE**

This is the first course in the Certified Financial Planner (CFP) program. The course provides an overview of a variety of financial planning topics with a special emphasis on retirement planning. The purpose of the course is to provide a foundation for subsequent course work in the CFP® program and to prepare students to take the national CFP® examination to become a Certified Financial Planner.

#### **I. PREREQUISITE**

For information regarding prerequisites for this course, please refer to the [Academic Course Catalog](#).

#### **II. REQUIRED RESOURCE PURCHASE**

Click on the following link to view the required resource(s) for the term in which you are registered: <http://bookstore.mbsdirect.net/liberty.htm>

#### **III. ADDITIONAL MATERIALS FOR LEARNING**

- A. Computer with basic audio/video output equipment
- B. Internet access (broadband recommended)
- C. Blackboard [recommended browsers](#)
- D. Microsoft Office

#### **IV. MEASURABLE LEARNING OUTCOMES**

Upon successful completion of this course, the student will be able to:

- A. Demonstrate the importance of the time value of money in financial and retirement planning.
- B. Identify the economic, social, political, and technological environments impacting financial planning.
- C. Explain how financial plans should accommodate existing economic, social, political, and technological environments.
- D. Identify the processes for helping clients achieve their financial goals.
- E. Recognize the use of credit and planned borrowing to meet household consumption, asset acquisition and other financing needs.
- F. Select the advantages and disadvantages of credit and borrowing to the financial planning process.
- G. Identify strengths and weaknesses in a client's initial situation while determining solutions for these weaknesses.
- H. Explain what Scripture says about the role of money and possessions in the life of a Christian.

#### **V. COURSE REQUIREMENTS AND ASSIGNMENTS**

- A. Textbook readings and lecture presentations/notes
- B. Course Requirements Checklist  
After reading the Syllabus and [Student Expectations](#), the student will complete the related checklist found in Module/Week 1.
- C. Discussion Board Forums (4)  
The student will participate in 4 Discussion Board Forums by submitting a 400-word thread demonstrating course-related and biblical knowledge to each of the instructor's prompts. Each thread will be supported by at least 2 citations from current academic journals. In addition to the thread, the student is required to reply to 2 other classmates' threads. Each reply will be 200 words and have at least 1 citation from current academic journals. Current APA formatting must be used for both threads and replies.
- D. Case Studies (2)  
The student will complete two Case Studies in this course. Current APA formatting must be used.
- E. Quizzes (8)  
There will be weekly quizzes in this course. Each quiz will contain 15 multiple-choice and true/false questions, and have a time limit of 40 minutes.

F. Mid-term Exam

The Mid-term Exam will cover the Reading & Study materials assigned during modules/weeks 1-4. This will consist of 75 multiple-choice and true/false questions, and have a 2 hour time limit.

G. Final Exam

The Final Exam will cover the Reading & Study materials assigned during modules/weeks 5-8. This will consist of 75 multiple-choice and true/false questions, and have a 2 hour time limit.

**VI. COURSE GRADING AND POLICIES**

A. Points

Course Requirements Checklist	10
Discussion Board Threads (4 at 55 pts ea)	220
Discussion Board Replies (4 at 30 pts ea)	120
Case Study 1	50
Case Study 2	70
Quizzes (8 at 30 pts ea)	240
Mid-term Exam	150
Final Exam	150
<b>Total</b>	<b>1010</b>

B. Scale

A = 900–1010 B = 800–899 C = 700–799 D = 600–699 F = 0–599

C. Disability Assistance

Students with a documented disability may contact Liberty University Online’s Office of Disability Academic Support (ODAS) at [LUOODAS@liberty.edu](mailto:LUOODAS@liberty.edu) to make arrangements for academic accommodations. Further information can be found at [www.liberty.edu/disabilitysupport](http://www.liberty.edu/disabilitysupport).

## ***COURSE SCHEDULE***

### **BUSI 352**

Textbook: Dalton et al., *Fundamentals of Financial Planning* (2016).

<b>MODULE/ WEEK</b>	<b>READING &amp; STUDY</b>	<b>ASSIGNMENTS</b>	<b>POINTS</b>
<b>1</b>	Dalton et al.: chs. 1–2 1 presentation	Course Requirements Checklist	10
		Class Introductions	0
		DB Forum 1 Thread	55
		Quiz 1	30
<b>2</b>	Dalton et al.: chs. 3–4 1 presentation	DB Forum 1 Replies	30
		Quiz 2	30
<b>3</b>	Dalton et al.: chs. 6–7 1 presentation	DB Forum 2 Thread	55
		Quiz 3	30
<b>4</b>	Dalton et al.: chs. 8, 10 1 presentation	DB Forum 2 Replies	30
		Quiz 4	30
		Midterm Exam	150
<b>5</b>	Dalton et al.: ch. 11 1 presentation	DB Forum 3 Thread	55
		Case Study 1	50
		Quiz 5	30
<b>6</b>	Dalton et al.: ch. 15 1 presentation	DB Forum 3 Replies	30
		Quiz 6	30
<b>7</b>	Dalton et al.: ch. 16 1 presentation	DB Forum 4 Thread	55
		Case Study 2	70
		Quiz 7	30
<b>8</b>	Dalton et al.: chs. 17–18 1 presentation	DB Forum 4 Replies	30
		Quiz 8	30
		Final Exam	150
<b>TOTAL</b>			<b>1010</b>

DB = Discussion Board

**NOTE:** Each course module/week begins on Tuesday morning at 12:00 a.m. (ET) and ends on Monday night at 11:59 p.m. (ET). The final module/week ends at 11:59 p.m. (ET) on **Friday**.