

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

BUSI 686

FINANCIAL PLANNING

COURSE DESCRIPTION

An overview of personal financial decision-making, emphasizing each phase of life. Topics covered include career planning, budgeting, use of credit, insurance, investments, retirement planning, and income tax planning.

RATIONALE

This course creates the foundation of the entire CFPT™ curriculum. The student will learn the basic tenants of financial planning that later courses will add on to. Additionally, this course is part of the core CERTIFIED FINANCIAL PLANNING™ designation educational curriculum, allowing the student to sit for the national CFP® designation exam.

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. RECOMMENDED RESOURCE

American Psychological Association. *Publication manual of the American Psychological Association* (Current ed.). Washington, DC: Author.

IV. ADDITIONAL MATERIALS FOR LEARNING

- A. Computer with basic audio/video output equipment
- B. Internet access (broadband recommended)
- C. Blackboard [recommended browsers](#)
- D. Microsoft Word
- E. Money Education (2018): Financial Statement Preparation & Analysis online tool. This resource is available after logging into the Money Education site (link below) and creating a student account. <http://www.money-edonline.com/fspaweb/>
- F. Money Education (2018): Practice Portal.

Students should register on the Money-Education website to gain access to the Practice Portal and access the Financial Planning Analysis software.

V. MEASURABLE LEARNING OUTCOMES

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

- A. Integrate biblical wisdom into the foundations of personal financial planning.
- B. Apply the required steps in the financial planning process considering economic conditions and provide various strategies to goal obtainment.
- C. Defend the CFP Code of Ethics in the financial planning process.
- D. Assess the functions, purposes, and regulations of financial institutions and services.
- E. Differentiate the impact of business and consumer protection law.

VI. COURSE REQUIREMENTS AND ASSIGNMENTS

- A. Textbook readings and lecture presentations/notes
- B. Course Requirements Checklist

After reading the Course Syllabus and [Student Expectations](#), the student will complete the related checklist found in Module/Week 1.

- C. Discussion Board Forums (3)

Discussion boards are collaborative learning experiences. Therefore, the student is required to provide a thread in response to the provided topic that must be at least 350 words and integrate information drawn from experience and course-related information. Each discussion board post must be posted in the Discussion Board Forum and as an attached Word document to the post. In addition to the thread, the student is required to reply to 2 other classmates' threads. Each reply must be at least 250 words and integrate information drawn from experience and course-related information (books, articles, and presentations).

- D. End-of-Chapter Discussion Questions (3)

The student will answer multiple discussion questions found at the end of each chapter.

- E. Mini-Case Written Assignments (2)

There are 2 written assignments in the course. These assignments are from a case study that is provided by the instructor. Each written assignment varies in its length requirements.

- F. Quizzes (6)

Each quiz will cover the Reading & Study material for the assigned module/week. Each of the 6 quizzes will be open-book/open-note and in a multiple choice format. The student will have 90 minutes to complete 25 questions.

- G. Comprehensive Final Exam

The final comprehensive exam will be open-book/open-notes, contain 100 multiple-choice questions, and have a 3-hour time limit. The exam will cover all topics covered throughout this course.

VII. COURSE GRADING AND POLICIES**A. Points**

Course Requirements Checklist	10
Discussion Board Forums (3 at 50 pts ea)	150
End of Chapter Discussion Questions (3 at 50 pts ea)	150
Mini-Case Written Assignment (2 at 100 pts ea)	200
Quizzes (6 at 50 pts ea)	300
Comprehensive Final Exam	200
Total	1010

B. Scale

A = 940–1010 A- = 920–939 B+ = 900–919 B = 860–899 B- = 840–859

C+ = 820–839 C = 780–819 C- = 760–779 F = 0–759

C. Quizzes/Tests/Exams

For timed quizzes/tests/exams, the student is required to complete the quiz/test/exam within the assigned time. For the student who exceeds this time limit, a penalty of 1 point will be deducted for each minute, or part thereof, he/she exceeds the assigned time limit.

D. Disability Assistance

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

If you have a complaint related to disability discrimination or an accommodation that was not provided, you may contact ODAS or the Office of Equity and Compliance by phone at (434) 592-4999 or by email at equityandcompliance@liberty.edu. Click to see a full copy of Liberty's [Discrimination, Harassment, and Sexual Misconduct Policy](#) or the [Student Disability Grievance Policy and Procedures](#).

COURSE SCHEDULE

BUSI 686

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

MODULE/ WEEK	READING & STUDY	ASSIGNMENTS	POINTS
1	Dalton et al.: chs. 1–2	Course Requirements Checklist Class Introductions DB Forum 1 Quiz 1	10 0 50 50
2	Dalton et al.: ch. 7, 15	EOC Discussion Questions 1 Quiz 2	50 50
3	Dalton et al.: ch. 2–3	DB Forum 2 Quiz 3	50 50
4	Dalton et al.: chs. 4–6	EOC Discussion Questions 2 Quiz 4	50 50
5	Dalton et al.: ch. 8, 11, & 16	Written Assignment 1	100
6	Dalton et al.: ch. 9, 12, & 14	DB Forum 3 Quiz 5	50 50
7	Dalton et al.: ch. 13, 17	EOC Discussion Questions 3 Quiz 6	50 50
8	Dalton et al.: ch. 10, 18	Written Assignment 2 Comprehensive Final Exam	100 200
TOTAL			1010

DB = Discussion Board

EOC= End of Chapter

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