F98

GRANDE PRAIRIE REGIONAL COLLEGE
DEPARTMENT OF BUSINESS ADMINISTRATION
COURSE OUTLINE

BA 2700 - PERSONAL FINANCIAL PLANNING 3(3-0)

TEXT: Course material from Canadian Institute of Financial Planning.

PREREQUISITE: Nil

COURSE DESCRIPTION: Personal Financial Planning provides students with the fundamentals of financial planning. Topics include financial objectives and money management, financial planning process, tax planning, financing, investment products and planning, estate planning, retirement planning and risk management.

COURSE OBJECTIVES: This course provides students with an introduction to personal financial planning. This course transfers to the Canadian Institute of Financial Planning's Personal Financial Planning course. Students must write the Institute exam to receive credit from the Institute. The GPRC exam is for college credit only. Prior to writing the Institute exam a passing grade must be obtained in the GPRC course.

GRADING:

Mid-term Exam	30%
Final Exam	40%
Assignments	30%

INSTRUCTOR:

J. Nutting	**Tel:**	539-2815
M.Sc. Financial Economics	**Room:**	C210

COURSE CONTENT:

1. Personal Financial Planning'
2. Income, Taxes and Expenditures
3. Money Management
4. Personal-Use Assets
5. Time Value of Money
6. Financial Economics
7. Income Tax Planning
8. Education Planning
9. Investment Products
10. Investment Planning
11. Retirement Planning
12. Risk Management
13. Estate Planning
14. A Case Study in Personal Financial Planning