

GRANDE PRAIRIE REGIONAL COLLEGE  
COURSE OUTLINE  
FALL 2000

SEP 13 2000

BA 2700  
PERSONAL FINANCIAL PLANNING

**CREDITS:**

3 Hours per week - 3 Lecture, 0 Lab

**PREREQUISITE:**

No official prerequisites are required but students should have a good grasp of business math and be familiar with financial calculators.

**INSTRUCTOR:**

Marjorie Ferguson  
Office: E401; Office telephone: 539-2714  
e-mail: ferguson@gprc.ab.ca

**OFFICE HOURS:**

MTR 2:00 - 3:00 PM, It is best to make an appointment.

**TEXT:**

Personal Financial Planning, The Canadian Institute of Financial Planning.

**COURSE DESCRIPTION:**

This course consists of an introduction to the fundamentals of financial planning. Topics covered include financial objectives and money management, the financial planning process, planning in the tax environment, financing, investment products and planning, estate planning, retirement planning, and risk assessment and 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.

**EVALUATION:**

Assignments	20% (four @ 5%)
Midterm	30%
Presentation	10%
Final	40%

**GRANDE PRAIRIE REGIONAL COLLEGE  
COURSE OUTLINE  
FALL 2000**

<b>Date</b>	<b>Topic</b>
Sep 11	-Course Overview -Course Outline - Formation of groups and assignment of presentation topics -Intro to Personal Financial Planning (Ch 1)
Sep 18	-Income, Taxes and Expenditures (Ch 2)
Sep 25	-Money Management (Ch 3) -Personal -Use Assets (Ch 4)
Oct 2	-Assignment # 1 due -Time Value of Money (Ch 5) -Financial Economics (Ch 6)
Oct 9	-Thanks-giving, Enjoy!
Oct 16	-Income Tax Planning (Ch 7)
Oct 23	-Midterm - Assignment #2 due -Education Planning (Ch8)
Oct 30	-Investment Products (Ch 9)
Nov 6	-Investment Planning (Ch 10)
Nov 13	-Assignment #3 due -Retirement Planning (Ch 11) -Risk Management (Ch 12)
Nov 20	-Estate Planning (Ch 13)
Nov 27	-A Case Study in Personal Financial Planning (Ch14)
Dec 4	-Assignment #4 due -Epilogue and Review