

SYLLABUS

BADM-132 Introduction to Financial Planning

3 CREDITS

CATALOG DESCRIPTION

This course emphasizes the decision-making processes necessary for all aspects of personal financial planning. It familiarizes the student with a budgeting framework that enables the coordination of current goals with future goals. Students will be introduced to various aspects of major financial decision-making.

Semester Offered: Spring

Prerequisites: NONE

Co-requisites: NONE

Common Student Learning Outcomes

Upon successful completion of San Juan College programs and degrees, the student will...

<i>Learn</i>	<i>Students will actively and independently acquire, apply and adapt skills and knowledge to develop expertise and a broader understanding of the world as lifelong learners.</i>
<i>Think</i>	<i>Students will think analytically and creatively to explore ideas, make connections, draw conclusions, and solve problems.</i>
<i>Communicate</i>	<i>Students will exchange ideas and information with clarity and originality in multiple contexts.</i>
<i>Integrate</i>	<i>Students will demonstrate proficiency in the use of technologies in the broadest sense related to their field of study.</i>
<i>Act</i>	<i>Students will act purposefully, reflectively, and respectfully in diverse and complex environments.</i>

GENERAL LEARNING OBJECTIVES

1. To provide a workable financial plan through goal setting and budgeting.
2. To introduce professionals to help students make financial decisions.
3. To present the five steps of financial decision-making.

SPECIFIC LEARNING OUTCOMES

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

1. Explain how our economy works and what it means to each individual.
2. Decide on a future personal career pattern.
3. Develop a workable personal budget plan that includes short and long-range goals.
4. Demonstrate smart shopper techniques and strategies.
5. Avoid becoming a victim of frauds and swindles.
6. Use beneficial techniques for purchasing items using cash, loans, credit cards, etc.

7. Assess the problems and benefits of home ownership.
8. Explain the processes involved in selling a home.
9. Explain where money is kept in our economy.
10. Develop plans on how to protect and invest personal financial assets.
11. Determine which tools to use in order to protect a persons income through insurance programs, investments, and estate planning.
12. Understand how to deal with all types of INCOME TAXES.

Syllabus developed by Murdoch Maloney **Date** May 1, 2007

Syllabus reviewed by Nancy Shepherd **Date** April 7, 2009

A copy of syllabus is on file in the dean's office.