Term Information

Effective Term: Spring 2013
Previous Value: Summer 2012

Course Change Information

What change is being proposed? (If more than one, what changes are being proposed?)
Add prerequisites and corequisites; add 1 credit for discussion sections

What is the rationale for the proposed change(s)?
This course is needed because the financial planning track of the CSCFFS major is registered with the Certified Financial Planning Board to enable students to meet the education requirement for becoming a Certified Financial Planner. As of Jan. 1, 2012, students enrolling in a CFP Board registered academic program must complete a financial plan preparation course. In the semester conversion, we eliminated one prerequisite to our financial plan preparation course, and after further discussion decided that 3 semester credits would not be sufficient for learning objectives. Adding prerequisites and corequisites to insure that this really is a capstone course as required by curriculum objective.

What are the programmatic implications of the proposed change(s)?
(e.g. program requirements to be added or removed, changes to be made in available resources, effect on other programs that use the course)?
Add one credit to one track in major, so will reduce "choose from" credits.

Is approval of the request contingent upon the approval of other course or curricular program request? No

Is this a request to withdraw the course? No

General Information

Course Bulletin Listing/Subject Area: Consumer Sci: Con&Fam Fin Serv
Fiscal Unit/Academic Org: Dept Of Consumer Sciences - D1255
College/Academic Group: Education & Human Ecology
Level/Career: Graduate, Undergraduate
Course Number/Catalog: 5260
Course Title: Family Financial Management Applications
Transcript Abbreviation: Fam Financl Mgt Ap
Course Description: Family financial management concepts are applied to evaluate financial goals and prepare a comprehensive financial plan for a household.

Semester Credit Hours/Units: Fixed: 4
Previous Value: Fixed: 3

Offering Information

Length Of Course: 14 Week, 7 Week, 4 Week (May Session), 12 Week (May + Summer)
Flexibly Scheduled Course: Never
Does any section of this course have a distance education component? No
Grading Basis: Letter Grade
Repeatable: No
Course Components: Lecture, Recitation
Previous Value: Lecture
Grade Roster Component: Lecture
Credit Available by Exam: No
Prerequisites and Exclusions

Prerequisites/Corequisites
Prereq: CSCFFS 3260 (CSCFmFnS 359), 4260 (560), and BusFin 420. Prereq or concur: CSCFFS 4280 (568); CSCFFS 4270 (561);

Exclusions
Not open to students with credit for CSCFmFnS 660.

Cross-Listings

Subject/CIP Code

Subject/CIP Code 19.0201
Subsidy Level Masters Course
Intended Rank Senior, Masters

Quarters to Semesters

Semester equivalent of a quarter course (e.g., a 5 credit hour course under quarters which becomes a 3 credit hour course under semesters)

List the number and title of current course being converted CSCFmFnS 660: Family Financial Management Application.

Requirement/Elective Designation

Required for this unit's degrees, majors, and/or minors

Course Details

Course goals or learning objectives/outcomes
* Evaluate family financial goals and prepare a comprehensive financial plan
* The influence of individual and family needs on household decisions
* How social and economic conditions relate to the financial services industry
* Family risk exposure and management
* Retirement planning, benefits selection, and taxation
* Money management, debt counseling, and investment practices for different situations
* Ethical decision making when working with families and clients
* Ability to make a wide range of clients feel comfortable and ability to work well in teams
* Quantitative skills
* Writing skills: ability to write reports describing complex products and strategies in easy to understand language
* Oral communication skills: describe complex products and strategies in easy to understand language
Attachments

Comments

- Please add changes in CFP Board education program standards and required planning class as part of rationale. (by Fox, Jonathan Jay on 01/13/2012 03:03 PM)

Workflow Information

<table>
<thead>
<tr>
<th>Status</th>
<th>User(s)</th>
<th>Date/Time</th>
<th>Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submitted</td>
<td>Hanna, Sherman Davie</td>
<td>01/13/2012 02:38 PM</td>
<td>Submitted for Approval</td>
</tr>
<tr>
<td>Revision Requested</td>
<td>Fox, Jonathan Jay</td>
<td>01/13/2012 03:03 PM</td>
<td>Unit Approval</td>
</tr>
<tr>
<td>Submitted</td>
<td>Hanna, Sherman Davie</td>
<td>04/10/2012 08:18 AM</td>
<td>Submitted for Approval</td>
</tr>
<tr>
<td>Approved</td>
<td>Fox, Jonathan Jay</td>
<td>04/10/2012 04:02 PM</td>
<td>Unit Approval</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Achtermberg, Cheryl L Blount, Jackie Marie Zircher, Andrew Paul</td>
<td>04/10/2012 04:02 PM</td>
<td>College Approval</td>
</tr>
</tbody>
</table>