

Financial planning course Outline

COURSE INFORMATION Materials – Textbooks, Readings, Supplementary Readings Textbook/Materials Required Title Description ISBN Fundamental of Financial Planning, 5 th edition. Printed and eBook both available. Website: <https://www.moneyeducation.com/> ISBN 978-1-936602-41-4

Grading system

Exam 1 – 25%	A = 90%-100%
Exam 2 – 25%	B = 80%-89%
Exam 3 – 30%	C = 70%-79%
Case 1 – 10%	D = 60%-69%
Quizzes – 10%	F = 59% or below
Total – 100%	

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Course outline

Chapter 1 and 2	Introduction to Financial Planning / Communication
Chapter 3 & 4	Financial Statements and Ratio Analysis
Chapter 7	The Time Value of Money
Chapter 15	Regulations and Consumer Laws/ Debt & Credit Management
	Exam 1
Chapter 5	Risk Management Process: Auto/Home insurance
Chapter 5	Risk Management Process: Life/Health/Disability/LTC
Chapter 12	Income Tax Planning
Chapter 8	Education Planning
	Exam 2
Chapter 9	Investment Planning
Chapter 11	Retirement Planning
Chapter 14	Estate Planning
Chapter 16	Ethics and Standards of Professional Conduct
Chapter 17	Planning for Special Circumstances
	Exam 3

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