

## FLORIDA STATE COLLEGE AT JACKSONVILLE

## COLLEGE CREDIT COURSE OUTLINE

COURSE NUMBER: FIN 1122

COURSE TITLE: Fundamentals of Financial Planning

PREREQUISITE(S): None

COREQUISITE(S): None

CREDIT HOURS: 3

CONTACT HOURS/WEEK: 3

CONTACT HOUR BREAKDOWN:

Lecture/Discussion: 3

Laboratory:

Other \_\_\_\_\_:

FACULTY WORKLOAD POINTS: 3

STANDARDIZED CLASS SIZE ALLOCATION: 25

## CATALOG COURSE DESCRIPTION:

This course introduces students to the fundamental issues of personal financial planning and is based on the learning objectives specified by the CFP Board of Standards with emphasis on the process of financial planning. This course is designed to provide students with an understanding of the concepts of the financial planning process, the economic environment, the time value of money, the legal environment, financial analysis, and ethical and professional considerations in financial planning. This course is intended to be the first of a series of six core courses in the Financial Services Associate in Science degree (Financial Planning Associate Track).

SUGGESTED TEXT(S): Personal Finance, 6<sup>th</sup> edition, Kapoor, Irwin/McGraw Hill

Time and Money, 7<sup>th</sup> edition, Crowe. Keir Educational Resources

Financial Calculator, HP-12C

IMPLEMENTATION DATE: Fall Term, 2000

REVIEW OR MODIFICATION DATE: Fall Term, 2002 (20031)

COURSE TOPICS	CONTACT HOURS <u>PER TOPIC</u>
I. Financial Planning Process	10
II. Economic Environment	8
III. Time Value of Money	17
IV. Legal Environment as it Pertains to Financial Planning	8
V. Financial Analysis	5
VI. Ethical and Professional Responsibility	5
VII. Lab	4
VIII. Final Exam	3

PROGRAM TITLE: Financial Services (Financial Planner Associate)

COURSE TITLE: Fundamentals of Financial Planning

CIP NUMBER: 0206.030100

LIST PERFORMANCE STANDARD ADDRESSED:

NUMBER(S): TITLES(S):

01.0 DEMONSTRATE HUMAN RELATIONS SKILLS NECESSARY FOR SUCCESS IN FINANCE AND CREDIT OCCUPATIONS--The student will be able to:

- 01.01 Demonstrate a positive mental attitude.
- 01.02 Exhibit interest and enthusiasm.
- 01.03 Exhibit punctuality and dependability.
- 01.04 Demonstrate traits of being industrious and cooperative.
- 01.05 Demonstrate sincerity, patience, courtesy, and tact.
- 01.06 Demonstrate willingness to assume responsibility for one's actions.
- 01.07 Demonstrate willingness to assume job responsibilities.
- 01.08 Accept criticism and use it constructively.
- 01.09 Develop ability to handle negative customer/co-worker situations.
- 01.10 Develop ability to exhibit friendliness, combined with a professional, businesslike approach.

02.0 DEMONSTRATE ABILITY TO COMMUNICATE SKILLFULLY--The student will be able to:

- 02.01 Give oral reports to demonstrate the ability to effectively express oneself before a group.
- 02.02 Demonstrate good customer communication skills.
- 02.02 Understand communication concepts, goals, skills, and criteria.
- 02.04 Organize and prepare reports.
- 02.05 Prepare different categories/structures of messages.

03.0 UTILIZE EFFECTIVE CROSS SELLING TECHNIQUES AND PROCEDURES FOR FINANCIAL SERVICES--  
The student will be able to:

- 03.01 Identify opportunities for cross selling.
- 03.02 Demonstrate how to sell a variety of financial services.
- 03.03 Demonstrate knowledge of all services offered by financial institutions.
- 03.04 Explain the importance of and demonstrate the procedures of cross selling.

04.0 DEMONSTRATE KNOWLEDGE OF THE HISTORY, GROWTH, AND STRUCTURE OF THE FINANCIAL INDUSTRY--The student will be able to:

- 04.01 Demonstrate a knowledge of the evolution of American financial institutions.
- 04.02 Identify major acts and important regulations resulting from the growth and changes in financial institutions.

LIST PERFORMANCE STANDARD ADDRESSED: (CONTINUED)

NUMBER(S):            TITLES (S):

04.03    Explain the similarities and differences in the financial institutions and other businesses that offer financial services.

04.04    Explain the effects of deregulation.

05.0    UNDERSTAND TERMINOLOGY UNIQUE TO THE FINANCE AND CREDIT INDUSTRY--The student will be able to:

05.01 Understand and use terminology as it applies to the finance and credit industry.

05.02 Know how to communicate with a customer in laymans language.