

FLORIDA STATE COLLEGE AT JACKSONVILLE

COLLEGE CREDIT COURSE OUTLINE

COURSE NUMBER:	FIN 2123
COURSE TITLE:	Investment Planning, Retirement Planning and Employee Benefits
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:	30

CATALOG COURSE DESCRIPTION: This course introduces students to the application of investment planning, retirement planning and employee benefits in the personal financial planning process. This course is designed to provide students with an understanding of the concepts of investment regulation, client assessment, investment theory, environment and financial markets, strategies and tactics, modern portfolio theory, integration, ethical considerations, social security and Medicare benefits, retirement plan types, qualified plan characteristics, distributions and distribution options, group insurance benefits, other employee benefits and analysis of retirement factors.

SUGGESTED TEXT(S): The Tools and Techniques of Employee Benefit and Retirement Planning, 7th edition, Leimberg, National Underwriter. Investment Planning, Keir.

Personal Finance, Kapoor, Irwin/McGraw Hill

IMPLEMENTATION DATE: Fall Term, 2003 (20041)

REVIEW OR MODIFICATION DATE: Fall Term, 2004 (20051)

COURSE TOPICS	<u>CONTACT HOURS PER TOPIC</u>
I. Client Assessment	2
II. Investment Vehicles	6
III. Regulation as it Pertains to Investments	1
IV. Theory and Markets	5
V. Portfolio Strategy	2
VI. Modern Portfolio Theory	2
VII. Integration as it Pertains to Financial Goals and Investment	1
VIII. Ethics	1
IX. Social Security and Medicare	1
X. Retirement Plans	5
XI. Qualified and Non-Qualified Plan Characteristics	3
XII. Distributions	3
XIII. Insurance Planning as it pertains to Financial Goals and Investments	3
XIV. Employee Benefits	5
XV. Client Financial Analysis as it pertains to Retirement Planning and Employee Benefits	2
XVI. Final Exam	3

PROGRAM TITLE: Financial Services (Financial Planning Associate)

COURSE TITLE: Investment Planning, Retirement Planning and Employee Benefits

CIP NUMBER: 1206.030100 & 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 feedback 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 THE 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.
 - 02.03 Understand communication concepts, goals, skills, and criteria.
 - 02.04 Organize and prepare oral and written reports.
- 03.0 UNDERSTAND TERMINOLOGY UNIQUE TO THE FINANCE AND CREDIT INDUSTRY—The student will be able to:
- 03.01 Understand and use terminology as it applies to the finance and credit industry.
 - 03.02 Know how to communicate with a customer in layman's language.



NOTE: Use either the Tab key or mouse click to move from field to field. The box will expand to accommodate your entry.

<i>Section 1</i>	
COURSE PREFIX AND NUMBER: <u>FIN 2123</u>	SEMESTER CREDIT HOURS: <u>3</u>
COURSE TITLE: <u>Investment Planning, Retirement Planning and Employee Benefits</u>	

Section 2

TYPE OF COURSE: (Click on the box to check all that apply)

<input type="checkbox"/> AA Elective	<input type="checkbox"/> AS Required Professional Course	<input type="checkbox"/> College Prep
<input type="checkbox"/> AS Professional Elective	<input checked="" type="checkbox"/> AAS Required Professional Course	<input type="checkbox"/> Technical Certificate
<input type="checkbox"/> Other _____		
<input type="checkbox"/> General Education: (For General Education courses, you must also complete Section 3 and Section 7)		

Section 3 (If applicable)

INDICATE BELOW THE DISCIPLINE AREA FOR GENERAL EDUCATION COURSES:

<input type="checkbox"/> Communication	<input type="checkbox"/> Social & Behavioral Sciences	<input type="checkbox"/> Mathematics
<input type="checkbox"/> Natural Sciences	<input type="checkbox"/> Humanities	

Section 4

INTELLECTUAL COMPETENCIES:

<input checked="" type="checkbox"/> Reading	<input type="checkbox"/> Speaking	<input checked="" type="checkbox"/> Critical Analysis	<input checked="" type="checkbox"/> Quantitative Skills	<input type="checkbox"/> Scientific Method of Inquiry
<input checked="" type="checkbox"/> Writing	<input checked="" type="checkbox"/> Listening	<input type="checkbox"/> Information Literacy	<input type="checkbox"/> Ethical Judgment	<input type="checkbox"/> Working Collaboratively

<i>Section 5</i>	
LEARNING OUTCOMES	METHOD OF ASSESSMENT
<ul style="list-style-type: none"> Analyze and evaluate a wide range of employee benefits and retirement plans. 	Satisfactory completion of a personal financial data workbook as it relates to employee benefits and retirement plans.
<ul style="list-style-type: none"> Understand what types of investment vehicles are available, how to choose among them, and how to evaluate their performance.□ 	Satisfactory completion of a personal financial data workbook as it relates to investments and investment strategies.
<ul style="list-style-type: none"> Demonstrate knowledge of the techniques of managing family finances.□ 	Satisfactory completion of a personal financial data workbook as it relates to financial planning and debt management.□
<ul style="list-style-type: none"> 	

Section 6

Name of Person Completing This Form: Melissa Chandler